SAP Ariba

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Managing Projects, Teams, Documents, and Tasks

SAP Ariba Contracts
SAP Ariba Sourcing
SAP Strategic Sourcing Suite
SAP Ariba Supplier Information and Performance Management
SAP Ariba Supplier Lifecycle and Performance
SAP Ariba Supplier Risk

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Content

Managing Projects, Teams, Documents, and Tasks

This guide is for SAP Ariba users and administrators who need to create and manage projects, project teams, project documents, and tasks in SAP Ariba Strategic Sourcing and Supplier Management solutions. This guide also describes how to export project data to files.

This guide applies to:

- SAP Ariba Strategic Sourcing Suite
- SAP Ariba Sourcing
- SAP Ariba Contracts
- SAP Ariba Supplier Information and Performance Management
- SAP Ariba Supplier Lifecycle and Performance
- SAP Ariba Supplier Risk

Related Guides

- Searching, Completing Tasks, and Other Common User Actions
- Event Management Guide
- Project Administration Guide
- Project Template Guide
- Managing Project Email Notifications
- Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions

What Is a Project?

A project is a container that enables you to maintain all documents and information for an item such as an SAP Ariba Sourcing event, an SAP Ariba Contracts contract, or a procurement project.

Projects enable multiple users to work on the same documents or events with defined roles and processes. With projects, you can specify what tasks must be completed, who is responsible for completing a task, and when a task must be completed.

Project Types

The types of projects you can create vary depending on your SAP Ariba solution.

SAP Ariba Sourcing Project Types

SAP Ariba Sourcing supports three types of sourcing projects:

- **Quick Projects**
  A quick project is a single sourcing event such as an RFI, RFP, or auction that is created from a default SAP Ariba template. Quick projects are limited to the functionality defined in those templates, and are useful for creating basic events that do not require a lot of customization or process management.
- **Full Projects**
  A full project can be created from any available template, including templates your company has created to manage different business processes or types of events. Full projects can contain multiple sourcing events, or they can be sourcing projects. They include full support for process management, including document storage, tasks, a message board, and project team. It is common for companies use a sourcing project that includes planning and savings tracking to manage one or more subproject events.
  Events have specific features that are described in the Event Management Guide. The topics in this collection describe the features that are available in full sourcing projects.
- **Sourcing Requests**
  A **Sourcing Request** is a project type used to request a sourcing project. In most cases, a sourcing request contains the following items:
  - a sourcing project as a subproject of the request
  - an approval task; the subproject becomes visible in the **Documents** area of the sourcing request after the approval task is approved
  - a special **Sourcing Request Items** document, which can contain event information (rules, team, suppliers, and content)

  The subproject is a placeholder that the sourcing manager uses to create a sourcing event or project.
  Information in the **Sourcing Request Items** document is propagated to the sourcing project (or event) created from the sourcing request.
  There are two types of sourcing requests:

- **sourcing requests created from integration with external systems**
  In sites with the RFQ and Award Integration with SAP Ariba Sourcing feature, a sourcing request can be created automatically in SAP Ariba Sourcing based on the RFQ information received from the SAP or Oracle ERP system. No manual tasks are needed to create the sourcing request after the integration is configured. RFQ information (including line item data) is stored in the **Sourcing Request Items** document. Sourcing managers can review and approve the sourcing request and can create a sourcing event from the sourcing request.
  SAP Ariba Sourcing provides a default template, **Sourcing Request Template** for sourcing requests created from integration with external systems. A template author can create a new version of this template and modify it as needed.
- **sourcing requests created from the dashboard**
  Any user can create a sourcing request from the dashboard regardless of their group membership. Users can record their purchase requirements in the **Sourcing Request Items** document. After a sourcing request has been approved, the sourcing manager or any other user who has the permission to create a sourcing project can create a sourcing project, based on the information in the sourcing request.
  SAP Ariba Sourcing does not provide a default template for creating a sourcing request from the dashboard. A template author can create a sourcing request template by creating a copy of the **Sourcing Request Template** template provided for integration and modifying the copy. For more information, see Project Template Guide.

SAP Ariba Contracts Project Types

SAP Ariba Contracts supports two types of contract projects:

- **Contract Workspaces**
  A **Contract Workspace** is project used for contracts and includes information about the contract, contract documents, project team members, and tasks.
- **Contract Request**s
  A **Contract Request** is a project used to request a contract workspace. Contract requests usually contain a subset of the information used in a contract workspace and include the ability to create a contract workspace from the information provided. Contract requests are often used to enable users who are not contract authors to specify information needed for a contract workspace. For example, a sales representative can create a sales contract request that specifies the customer and commodity. A contract author can then use the sales contract request to create a sales contract workspace that contains the information specified by the sales representative. The contract request templates provided by SAP Ariba Contracts include a contract workspace as a subproject that becomes visible when the contract request is approved.

Contract workspaces and requests are both types of SAP Ariba projects. SAP Ariba features for projects are also supported for contract workspaces and requests except as noted. References in the user interface and documentation to projects also apply to contract workspaces and requests unless otherwise stated.

Contract Workspace Types

SAP Ariba Contracts supports the following contract workspace types:

- **Procurement** contract workspace: a workspace used for contracts with a supplier.

- **Sales** contract workspace: a workspace used for contracts with a customer or buyer.
- **Internal** contract workspace: a workspace intended for contracts within companies or organizations. By default, inside contract workspaces do not have **Supplier** or **Buyer** fields. Instead, they typically include a custom field for the employee or other legal party.

All contract workspaces include an **Affected Parties** field in which you can specify supplier or customer organizations who are involved in the contract project but not direct participants.

Contract Request Types

SAP Ariba Contracts supports the following contract request types:

- **Procurement contract request**: a project for requesting a procurement workspace.
- **Sales contract request**: a project for requesting a sales workspace.

Procurement Project Types

SAP Ariba Buying supports the following project types:

- **Procurement Workspaces**
  A procurement workspace is a project that acts as a single repository for all documents relating to a project, such as requisitions, contracts, purchase orders, invoices, receipts, and so forth.
- **Procurement Workspace Requests**
  A procurement workspace request is a project used to request a procurement workspace. When a request is approved, a procurement workspace can be created. Procurement workspace requests usually contain a subset of the information used in a procurement workspace and include the ability to create a procurement workspace from the information provided.

Procurement workspaces and procurement workspace requests are both types of SAP Ariba projects.

Project Components

The main components of projects are:

- Overview
  Attributes about the project, such as the name, owner, suppliers or customers, and start and end dates.
  SAP Ariba Contracts
- Documents
  Documents, such as planning documents, savings tracking documents, and forms.
  In certain types of SAP Ariba Sourcing projects (full projects), a project can contain multiple sourcing events in the **Documents** area.
  In procurement workspaces, this tab can contain requisitions and associated purchase orders, invoices, and receipts. You can click on the document link to open any of these documents from the **Documents** tab. All documents on the **Documents** tab are organized in folders that exist only when there is at least one document

of that type. For example, if there is at least one invoice, there will be a folder called Invoices. However, if there is no invoice associated with the procurement workspace, there will not be an Invoices folder on the **Documents** tab.
SAP Ariba supports documents in multiple formats, including Microsoft Word, ASCII text, and Microsoft Excel.

- Tasks
  Actions assigned to users, such as reviewing, approving, or negotiating. These tasks enable you to collaborate with internal or external users to review and revise project information. SAP Ariba tasks include features to specify workflow and approval orders and to help you track review versions and comments.
- Team
  The users who are allowed to access different areas of the project and perform different actions, such as modifying or reviewing documents.
- Message Board
  A collection of messages for the project. Users can create topics (messages), add replies to messages, and label messages for filtering. The system creates a unique email address for each project message board. Internal and external users who know the address can send messages to the project message board's email address for posting to the message board, so that project team members can collaborate with other internal users, suppliers, and interested outside parties.
- History
  A history of the project and its components, such as updated document versions. The history includes the name of the user who performed each change.

A project can also include links to related documents and knowledge projects.

Project Creation

The types of projects you can create vary depending on your SAP Ariba solution and the capabilities of the user groups you belong to.

Contract Project Creation [page 15]

Sourcing Project and Request Creation [page 25]

Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Project Management [page 49]
Project Types [page 11]

Contract Project Creation

You create SAP Ariba Contracts projects (contract requests or contract workspaces) using project templates that can be pre-populated with team members, documents, tasks, and other project items. The available templates can change depending on the project information (attributes) you specify. Project templates can also contain conditions that determine the documents, tasks, and phases created according to the project attributes.

If your SAP Ariba solution includes both SAP Ariba Sourcing and SAP Ariba Contracts, you can create a new contract workspace project directly from a SAP Ariba Sourcing event award. Contract workspaces created from event awards automatically include commodity, region, supplier, effective date, and expiration date information from the event, as well as a Microsoft Excel document containing pricing information. See the Event Management Guide for details on creating contract workspaces from the **Award** tab in a SAP Ariba Sourcing event.

Creating Contract Projects [page 16]

Creating Contract Workspaces from Procurement Workspaces [page 18]

Contract Request and Contract Workspace Fields [page 19]

Parent topic: Project Creation [page 15]

Related Information

Sourcing Project and Request Creation [page 25]
Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Creating Contract Projects

Use this procedure to create contract projects.

Prerequisites

- Define all of the project's requirements and make sure that the available templates meet those requirements. You might need to ask your template administrator to create additional templates.
- Select the appropriate project template.
- Review the supplementary documents that you want to include in the project.
- To associate predecessor project information with the contract, ensure that the following prerequisites are met:
  - Your SAP Ariba Contracts instance must be integrated with SAP Ariba Sourcing.
  - Your administrator must enable the **Enable predecessor event identification for contracts created from guided sourcing projects** (`IdentifyPredecessorEventforContractsCreatedFromGuidedSourcingProjects`) ICM parameter. For more information, refer to Enable predecessor event identification for contracts created from guided sourcing projects.

Procedure

1. On the dashboard, click **Create** and one of the following project types:
   - **Contract Request (Internal)**
   - **Contract Request (Procurement)**
   - **Contract Request (Sales)**
   - **Contract Workspace (Procurement)**
   - **Contract Workspace (Sales)**
     If you do not know what type of project to create, see Project Types [page 11].
2. Enter a name for the workspace in the **Name** field.
3. (Optional) Enter a description of the workspace.
4. Select a value for the **Test Project** field. In most cases, **No** is the appropriate value. Specify **Yes** if you are creating a project for internal testing or training. For more information, see Contract Request and Contract Workspace Fields [page 19].

   > ⓘ Note
   >
   > You cannot change the test project setting after you have created a project.
   >
   > You cannot create contract term documents (links to SAP Ariba procurement and invoicing compliance contracts) in test projects.

5. Select the contract term type from the **Term Type** pull-down menu.

6. Specify a value for the **Effective Date** (the date the contract goes into effect). You can change this value later, if needed.
7. **Optional:** Select a predecessor project of the contract from the **Predecessor Project** pull-down menu.

   The predecessor project is a guided sourcing full project. When you select a predecessor project, the option to select a predecessor event becomes available.
8. **Optional:** Select a predecessor event of the contract by choosing the **[select]** option with the **Predecessor Event** field.

   The **Select Predecessor Event** page appears where all the subprojects in the selected predecessor project are listed.
9. **Optional:** Select a subproject from the list.

   If you dont find the desired subproject in the list or if you dont want to associate a predecessor event, select **(no value)**.

   > ⓘ Note
   >
   > If you select this value, no predecessor event is selected. But the contract workspace is automatically associated with all the subprojects in the selected predecessor project.
10. Select values for the remaining contract fields.

    For more information about these fields, see Contract Request and Contract Workspace Fields [page 19].
11. Select a template for the project. The templates that are available depend on the project information you have entered and the user groups you belong to.
12. Answer any questions shown. The questions are determined by the project template.
13. Click **Create**.

Results

The contract workspace is created. To review the information added to the contract in detail, open the contract workspace in the **Full View** mode. For information about changing the contract workspace view, refer to Changing the Project View [page 57]

> ⓘ Note
>
> If you have associated predecessor project information with the contract, only a link is established between the selected guided sourcing projects and the contract workspace. No information is transferred from the guided sourcing project to the contract workspace.

Next Steps

- Configure SAP Ariba Contracts to automatically send email notifications before contract workspaces expire. See Editing Contract Dates (Terms) and Notification Schedules [page 65].
- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.

- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.
- Publish the project [page 69]. When all of the required tasks are completed and the documents are either published or in the draft state and ready for publication, you publish the project.
  A published, executed contract workspace project remains in effect until it expires, is closed, is amended to another contract, or is terminated. See Amending a Published Contract Workspace [page 75].

Task overview: Contract Project Creation [page 15]

Related Information

Creating Contract Workspaces from Procurement Workspaces [page 18]
Contract Request and Contract Workspace Fields [page 19]

Creating Contract Workspaces from Procurement Workspaces

Use this procedure to create contract workspaces from procurement workspaces.

Prerequisites

- You must have the ability to create the selected type of contract workspace, such as a procurement contract workspace.
- If you are a procurement workspace requestor, you must be a member of the procurement workspace project team to create a contract workspace from a procurement workspace.

Procedure

1. Open the procurement workspace.

For information about searching for procurement workspaces, see Finding and Opening a Project [page 55]

2. Click the **Documents** tab.
3. Click **Actions** and do either of the following:
   - To create a procurement contract workspace, click **Create Contract**.
   - To create a sales contract workspace, click **Create Sales Contract**.
4. Enter the required information on the **Create Contract Workspace (Procurement)** or **Create Contract Workspace (Sales)** page. For information about the fields on this page, see Creating Contract Projects [page 16].
5. Click **Create**.

Results

A link to the contract workplace is added to **Documents** tab of the procurement workspace.

Task overview: Contract Project Creation [page 15]

Related Information

Creating Contract Projects [page 16]
Contract Request and Contract Workspace Fields [page 19]

Contract Request and Contract Workspace Fields

Field	Required	Description
Name	X	Name (title) of the project. The name cannot be the name of another project in the same folder and cannot contain the following special characters: `\ / : ? “ < > | # + % &` Maximum length: 254 characters. ⓘ Note Do not end the project name with a period (.). Doing so causes a DFS synchronization error if you attempt to open a document in that project.

Field	Required	Description
Description		Description of the project. After you create the project, you can format the project description text with bold, italic, underlining, lists, or colors by choosing **Actions** > **Edit Overview**. Note Only the first 50 characters of the description are included in reports.
Related ID		Specifies an ID of a record or document in an external system that is related to the project.
Copy from Project		Choose a project from the pull-down menu to copy data from an existing project into the new project. For more information about copying projects, see Copying Projects [page 96].
Test Project	X	Test projects can be used for internal testing and training. By default, reports include data from test projects but you can filter out data from test projects when creating reports (except line-item data from forms in test projects, which are not filtered by the test project field). Test projects can be deleted at any time, regardless of their state. Test projects do generate email, just as regular projects do. Note You cannot change the test project setting after you have created a project. You cannot create contract term documents (links to SAP Ariba procurement and invoicing compliance contracts) in test projects.
Base Language		Select a base language from the pull-down menu if you are creating the project in a language other than the language specified in your user preferences. Note In view mode, templates and projects are displayed in the language that the user selects as their preference. In edit mode, the language displayed is that of the preference setting of the template or project. Uploaded document titles are created in the language preference defined in the template or contract workspace.

Field	Required	Description
Hierarchical Type		Specifies a relationship with another contract workspace. Valid values: • **Stand-alone Agreement** (standalone) A contract workspace that does not have a hierarchical relationship with any other contract workspaces. • **Master Agreement** A contract workspace that can be the parent of a subagreement. You must create a master agreement before you can associate a subagreement with it. Master agreements and their subagreements must be of the same contract workspace type (sales contract workspace, procurement contract workspace, or inside contract workspace). • **Sub Agreement** (subagreement) If you choose subagreement, SAP Ariba displays a field in which you must specify the parent agreement. A hierarchical relationship between workspaces can exist in addition to other relationships, such as subproject and follow-on project relationships. For more information about relationships between projects, see Project Linking [page 102].
Customer		Present only for sales requests and sales contracts. Specifies the customer for the contract.
Supplier		Present only for procurement requests and procurement contracts. Specifies the supplier for the contract. You can include supplier IDs in supplier selection lists, and you can search by supplier ID, by specifying a domain with the **Show the supplier ID in the user interface** (Application.SupplierChooser.OrganizationIDDomainName) configuration parameter. For more information, see Including the Supplier ID in Supplier Selection Lists and Searching Suppliers by ID in the Event Management Guide.
`internal_party`, such as **Employee**		A custom field added to specify parties for internal contract workspaces, such as Employee or Legal Party.
Affected Parties		Supplier or customer organizations that are involved in the contract project, but who might not be direct participants. For example, treasury agreements, cooperation agreements, and purchase agreements often include organizations that are not direct participants in a contract. This field is useful for contracts that are sometimes referred to as "multi-party contracts." The organization you specify as the contract project supplier or customer is automatically added as an affected party and cannot be removed from the Affected Parties field. You can add and remove other organizations in the Affected Parties field. Since a contract project's affected parties are distinct from its supplier or customer organization, you can use the Affected Parties field to filter searches or reports, or to search for a contract project's affected parties.
Product		Product for the contract.
Contract Amount		The monetary value of the contract; typically, this is the negotiated amount that has been approved.
Proposed Contract Amount		The proposed contract amount typically represents the original amount proposed while creating a contract.

Field	Required	Description
Commodity		The commodities for the project. Your company might refer to commodities as categories, UNSPSC codes, or by another term. An example of a commodity is office supplies. The values for this field can be used to pre-populate projects with team members, content, and approvers specific to the commodity.
Regions		The geographic regions for the project. The values for this field can be used to pre-populate projects with team members, content, and approvers specific to the region.
Departments		The departments for the project. This is typically used to specify the department in your organization involved in the project.
Predecessor Project		Choosing a predecessor project from the **Predecessor Project** pull-down menu creates this project as a follow-on project to an existing project. Fields in the current project that are also present in the predecessor project will be pre-populated with values from the predecessor project. For more information about follow-on projects, see Creating Follow-On Projects [page 104].
Engagement Request Project		(Visible only for procurement contract requests and workspaces and if your site is configured to integrate the SAP Ariba Supplier Risk solution with SAP Ariba Contracts enabled.) Specifies an engagement risk assessment project to be associated with the contract. The **Engagement Request Project** area in **Contract Attributes** shows the status and risk rating for the supplier based on the risk project. Enter the system ID for an engagement risk assessment project or use the chooser to select a project based on the contract supplier, and optionally, the region, commodity, and department.
Agreement Date		The date for the agreement. This field is provided for you to record information about the contract. You can use this field as defined by your organization. For example, this can be the date the contract is executed or the date the contract is accepted by the supplier or buyer. By default, this field does not affect project activities but does affect the status and can be used as a data point for setting conditions or scheduling. This field can be used as a document property field to provide dynamic text in assembled contract documents, as described in the Contract authoring guide.

Field	Required	Description
Term Type	X	The contract term type. Valid values: • **Fixed** A contract workspace that expires permanently when it reaches its expiration date. After the expiration date has passed, you can only extend a fixed contract workspace by amending it and changing the expiration date. • **Perpetual** A contract workspace that never expires; also known as an evergreen contract. Even though a perpetual contract never expires, you can set an expiration date and use that date with notification attributes to send email notifications as described in Editing Contract Dates (Terms) and Notification Schedules [page 65]. For example, you could send a reminder to have users review the contract 30 days before the specified expiration date. • **Auto Renew** A contract workspace that is automatically renewed (extended) past its expiration date. The first renewal occurs on the original expiration date. SAP Ariba updates the expiration date for each renewal. After the last expiration date has passed, you must use a renewal amendment type to extend it.
Renewal Interval **Maximum number of Intervals**		These fields are present only if the term type is **Auto Renew**. The interval between contract renewals, in months and the maximum number of renewals.
Effective Date	X	The date on which the contract becomes effective. This field is provided for you to record information about the contract. By default, this field does not affect project activities but does affect the status and can be used as a data point for setting conditions or scheduling. This field can be used to as a document property field to provide dynamic text in assembled contract documents, as described in the Contract authoring guide.
Expiration Date		The date on which the contract expires. This field is mandatory and only used in contract workspaces with **Fixed** or **Auto Renew** term types. The **Expiration Date** is also mandatory if **Hierarchical Type** is **Stand-alone Agreement**. For **Auto Renew** contract workspaces with one or more remaining renewals, this is the next date the contract will be automatically renewed. The expiration date is updated for each renewal. SAP Ariba marks contracts expired at the end of the day on the final expiration date. There can be a minor difference (generally fewer than 12 hours) between the time a contract workspace is marked expired and the end of the contract's expiration date in the local time zone. When a contract expires, tasks and other project activities stop. For more information about how projects are marked expired and how project activities are affected when a project expires, see Expiration Date. The expiration date can also be used to send email notifications relative to the expiration date. For more information, see Editing Contract Dates (Terms) and Notification Schedules [page 65].

Field	Required	Description
External System		(Visible only for procurement workspaces and if your site is integrated with multiple external systems.) Name of the external system (ERP) that the workspace is integrated with. If your site is integrated with only one external system, this field is not visible and the workspace is automatically integrated with that system. If your site is integrated with multiple external systems and you select a value, the workspace is integrated with the selected external system. If users add item master data to a line items document in the workspace, the items are filtered to show only item master data from the external system. If the workspace and the line items document are published, data from the workspace and line items document can be sent to the external system. If your site is integrated with multiple external systems and you do not select a value, the workspace will not be integrated with an external system. If users add item master data to a line items document in the workspace, they can add item master data from multiple external systems. Data from this workspace and the line items document cannot be sent to an external system, but items from the line items document can be copied to multiple follow-on projects, where each follow-on project is integrated with an external system; data is then sent to the external systems from the follow-on projects.
Company Code		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) SAP company code that identifies the company for the contract
Purchasing Organization		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) SAP purchasing organization for the contract..
Purchasing Group		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) SAP purchasing group for the contract.
Payment Terms		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) SAP payment terms for the contract.
Document Type		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) Type of document to create on the SAP ERP when data from this workspace is sent to the ERP. Select **Contract**.
Document Category		(Visible only for procurement workspaces and if your site is integrated with one or more external systems.) Category of document to create on the SAP ERP when data from this workspace is sent to the ERP. Select **WK Value Contract** or **MK Quantity Contract**.

Parent topic: Contract Project Creation [page 15]

Related Information

Creating Contract Projects [page 16]
Creating Contract Workspaces from Procurement Workspaces [page 18]

Sourcing Project and Request Creation

Sourcing projects are used to manage sourcing events: Request for Information (RFI) events, Request for Proposal (RFP) events, auctions, and forward auctions. A sourcing project can be either a quick project (single sourcing event) or a full project (one or more sourcing events, with full project management features).

Sourcing projects can also be created from sourcing requests. A sourcing request typically includes information about goods or services that a user or department wants to source. A sourcing project or event can then be created from the request and the information from the sourcing request is propagated to a sourcing project or event.

Sourcing requests can be created:

- Directly from the SAP Ariba dashboard. All SAP Ariba buyer users can create sourcing requests from the dashboard.
- Using the optional RFQ and Award Integration with SAP Ariba Sourcing feature. This feature is an integration between your ERP system, SAP Business Network, and SAP Ariba Sourcing.
  With the RFQ and Award Integration with SAP Ariba Sourcing feature, a sourcing request is created in SAP Ariba Sourcing after the following sequence of events:
  - an ERP user creates an RFQ
  - if the RFQ was created on an Oracle RFQ, the RFQ status is set to **Active**
  - the ERP system sends information about the sourcing request through the SAP Business Network

  Events created from sourcing request projects can be awarded to one or multiple suppliers. If your ERP system is configured with SAP Business Network and SAP Ariba Sourcing, event award information is sent back to your ERP system.
  After a sourcing event (or project) is created from an ERP sourcing request, any change or delete requests from the ERP have no effect on the event (or project) contents or state. SAP Ariba Sourcing sends an email notification to all active team members about the request and creates a log entry about the request.
  For more information about the RFQ and Award Integration with SAP Ariba Sourcing feature, see RFQ and Award Integration with SAP Ariba Sourcing.
- Using the optional Quick Sourcing for Requisitions feature. This feature enables you to create a sourcing request from a purchase requisition (PR) created in SAP Ariba Buying or SAP Ariba Buying and Invoicing.
  By default, sourcing requests created from a PR cannot be canceled or deleted from the SAP Ariba Sourcing user interface and must be canceled from SAP Ariba Buying or SAP Ariba Buying and Invoicing.
  For more information about the Quick Sourcing for Requisitions feature, see Quick Sourcing for Requisitions.

If your organization has both SAP Ariba Sourcing and SAP Ariba Contracts, you can create a new contract workspace project directly from an SAP Ariba Sourcing event award. Contract workspaces created from event awards automatically include commodity, region, supplier, effective date, and expiration date information from the event, as well as a Microsoft Excel document containing pricing information. See the Event Management Guide for details on creating contract workspaces from the **Award** tab in a SAP Ariba Sourcing event.

For an overview of project management features, see Introduction to Projects [page 11]; for information specifically about creating and managing SAP Ariba Sourcing events, see the Event Management Guide.

Parent topic: Project Creation [page 15]

Related Information

Contract Project Creation [page 15]
Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Creating Sourcing Projects

Use this procedure to create sourcing projects.

Prerequisites

Before you create a sourcing project, SAP Ariba recommends that you:

- Define all of the project's requirements and make sure that the available templates meet those requirements. You might need to ask your template administrator to create additional templates.
- Determine if you want to create a full project (one or more sourcing events, with full project management feature, including task management) or a quick project (a single sourcing event).
- Select the appropriate template for your project.
- Consider the supplemental documents you want to include in the project.

Context

> → Tip
>
> Use the field **Copy from Project** to create a copy of a project (or event) with the same type, template, rules, suppliers, and content. You can edit the new project before publishing it, if needed.

Procedure

1. On the dashboard, click **Create > Sourcing Project**.
2. **Optional:** If there is an existing sourcing project or event that you want to use as a base for your new project, navigate to the **Copy from Project** field and select the project you want to copy from in the dropdown.

   SAP Ariba Sourcing creates the new project with the same type, template, rules, suppliers, and content as the original project.

   a. Choose a response for **Do you want to copy project groups that were not in the template, from the project being copied?**

      The new project includes project groups members defined in the project template; by default any ad hoc project groups (project groups added later, or not inherited from the project template) are also copied to the new project. Choose **No** if you do want to copy the ad hoc project groups.
3. Select **Full Project** or **Quick Project**. A full project can contain multiple sourcing events and includes all project management features; a quick project is a single sourcing event.

   a. If you chose **Quick Project**, choose a value in the **Event Type** dropdown.

   Skip this step if you are using the **Copy from Project** field. The project and event type are selected for you, based on the project you are copying.
4. Select a value for the **Test Project** field. In most cases, **No** is the appropriate value. Specify **Yes** if you are creating a project for internal testing or training. For more information, see Sourcing Project Fields [page 35].

   > ⓘ Note
   >
   > You cannot change the test project setting after you have created a project.
5. Specify values for the remaining sourcing project fields; for information about these fields, see Sourcing Project Fields [page 35].
6. Select a template for the project. The templates that are available depend on the project information you have entered and the user groups you belong to.
7. Answer any questions shown. The questions are determined by the project template.
8. Click **Create**.

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.

- Add events (such as RFIs, RFPs, auctions, and surveys) to the project. Follow the steps for creating an event in the Event Management Guide, keeping in mind the following differences and limitations for events created in full sourcing projects:
  - The event inherits most of the project's basic information, such as regions, commodities, and suppliers.
  - The sourcing project's template defines the kinds of events you can create in it.
  - The event inherits the sourcing project's team, so there is no separate process for creating a team in the event.
  - There might be other limitations on specific elements in the event. See the Event Management Guide for details.
- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.
- Add documents [page 137] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The **Completion** column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.
- Publish the project. When all of the required tasks are completed and the documents are either published or in the draft state and ready for publication, you publish the project.

Task overview: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Requests from the Dashboard [page 29]
Processing Sourcing Requests Created from Integration Events [page 30]
Creating Sourcing Events from Sourcing Requests [page 32]
Creating Sourcing Projects and Events from Procurement Workspaces [page 34]
Sourcing Project Fields [page 35]

Creating Sourcing Requests from the Dashboard

All users can use this procedure to create a sourcing request from the dashboard, regardless of their group membership. A sourcing request can be used to store event information that is propagated to a sourcing project or event created from the request.

Prerequisites

You must have a project template for creating a sourcing request from the dashboard. When creating a sourcing request from the dashboard, you cannot use the template provided for creating sourcing requests with an ERP integration. The template used to create a sourcing request from the dashboard must meet the following requirements:

- The value of **Origin** field must be **Ariba**.
- The template must not have the visibility condition **(Origin)is equal to(External))** (the **IsExternalOrigin** condition) . This condition is present in the template for sourcing requests created using the RFQ and Award Integration with SAP Ariba Sourcing feature.

Procedure

1. On the dashboard, click **Create** > **Sourcing Request**.

   The **Create Sourcing Request** page opens.
2. Enter the details of your requirement.
3. Select the sourcing request template.
4. Click **Create.**

   The **Sourcing Request** page opens in **Full View** .
5. (Optional) By default, the sourcing request contains a **Sourcing Request Items** document that can store event information (rules, team, suppliers, and content. Information in the **Sourcing Request Items** document is propagated to the event or project created from this request. If the sourcing request is created from the dashboard, you can edit the **Sourcing Request Items** document.

   > Note
   >
   > If the sourcing request was created from the RFQ and Award Integration with SAP Ariba Sourcing feature, you cannot edit the **Sourcing Request Items** document.

   a. Under the **Documents** tab, click the **Sourcing Request Items** document. Select **Action** > **View Details**.

      The **Sourcing Request Items** document opens.

   b. Select **Actions** > **Edit**.

      The **Edit Event** page opens.

c. Enter a description and specify values for **Base Language**, **Currency**, and **Commodity** as appropriate. Click **OK**.

   You can enter information for the **Sourcing Request Items** as you would for an event, beginning with the event rules.

6. View and submit the tasks under the **Tasks** tab. Click on a task name and select **View Details**. Complete tasks assigned to you.

   By default, sourcing requests have an **Approval for Sourcing Request** approval task. This task is created for the entire request; when it is approved, a placeholder for a sourcing project becomes visible under the **Documents** tab and a sourcing event can be created. By default, the **Approval for Sourcing Request** task has an empty approval flow and will be automatically approved when it is submitted. If you do not want this task to be automatically approved, edit the task and add approvers to the flow before submitting it.

Next Steps

In most cases, a sourcing subproject will be visible in the **Documents** tab after the approval task for the request is approved. A user with the ability to create sourcing projects can click on this subproject and create a sourcing project (full sourcing project or quick project).

Task overview: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Projects [page 26]
Processing Sourcing Requests Created from Integration Events [page 30]
Creating Sourcing Events from Sourcing Requests [page 32]
Creating Sourcing Projects and Events from Procurement Workspaces [page 34]
Sourcing Project Fields [page 35]

Processing Sourcing Requests Created from Integration Events

If you have the RFQ and Award Integration with SAP Ariba Sourcing feature configured, SAP Ariba creates sourcing requests based on data received from the ERP system. Use this procedure to process those requests.

Context

By default, members of the **Sourcing Manager** group receive an email notification when a sourcing event is created from an integration event. The email notification includes the name of the sourcing request. These sourcing requests include, by default, required tasks that must be completed before a sourcing project or event can be created from the request.

> → Tip
>
> If you are an S/4HANA Cloud user, you can configure the *Sourcing with SAP Ariba Sourcing (4BL)* integration or the *Central Procurement with SAP Ariba Sourcing (4QN)* to enable Ariba Sourcing integration with S/4HANA Cloud.
>
> - For information about the 4BL workflow, see Sourcing with SAP Ariba Sourcing (4BL).
> - For information about the 4QN workflow, see Central Procurement with SAP Ariba Sourcing (4QN).
>
> > ⓘ Note
> >
> > The documentation links to the 4BL and 4QN workflow topics point to the English version of the SAP S/4HANA Cloud documentation. If you prefer a different language, use the language selection option at the top of the page to switch to the language of your choice.

Procedure

1. Locate the sourcing request. You can use the name of the request in the email notification as a search field.
2. Add supporting documents if needed. Open the **Documents** tab and select the appropriate option in the **Actions** menu.
3. View and submit the tasks under the **Tasks** tab. Click on a task name and select **View Details**. Complete tasks assigned to you.

   By default, sourcing requests have an **Approval for Sourcing Request** approval task. This task is created for the entire request; when it is approved, a placeholder for a sourcing project becomes visible under the **Documents** tab and a sourcing event can be created. By default, the **Approval for Sourcing Request** task has an empty approval flow and will be automatically approved when it is submitted. If you do not want this task to be automatically approved, edit the task and add approvers to the flow before submitting it.

Next Steps

In most cases, a sourcing subproject will be visible in the **Documents** tab after the approval task for the request is approved. A user with the ability to create sourcing projects can click on this subproject and create a sourcing project (full sourcing project or quick project).

Task overview: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Projects [page 26]

Creating Sourcing Requests from the Dashboard [page 29]
Creating Sourcing Events from Sourcing Requests [page 32]
Creating Sourcing Projects and Events from Procurement Workspaces [page 34]
Sourcing Project Fields [page 35]

Creating Sourcing Events from Sourcing Requests

After a sourcing request project is approved, use this procedure to create a sourcing project or event from the sourcing request.

Prerequisites

- The sourcing request is approved and a **Sourcing Project** subproject is visible under the **Documents** tab.
- You must be a member of one of the following groups:

  Category Manager
  Commodity Manager
  Customer Administrator (access to this group must be approved by SAP Ariba)
  Event Administrator (access to this group must be approved by the SAP Ariba Market Coordination Team)
  Junior Procurement Agent
  Junior Sourcing Agent
  Limited Event Administrator (access to this group must be approved by the SAP Ariba Market Coordination Team)
  Procurement Agent
  Sourcing Agent
  Sourcing Approver
  Sourcing Project Administrator (access to this group must be approved by the SAP Ariba Market Coordination Team)

Procedure

1. On the dashboard search bar, click the content type menu to the left of the search field and select **Sourcing Request**.
2. Enter search terms in the search field.
3. Perform one of the following actions:
   - Press `Enter` or click the search icon ( ) to start the search.
   - Select a search filter or save search from the filter menu to the right of the search field. The search starts automatically.
4. Click the **Sourcing Request** to open it.

5. Locate the **Sourcing Project** subproject under the **Documents** tab. Click **Sourcing Project** and choose **Open**.

   The **Create Sourcing Project** page opens.
6. Select the sourcing project type. If you select **Quick Project**, select a value for **Event Type**.
7. Enter the details of the project or event you want to create.

   The header field entries in the parent sourcing request, such as regions and departments, are carried over to the sourcing event.
8. Select a template for your project or event.
9. Click **Create**.

Results

- If you create a **Quick Project** from a sourcing request, the event is populated with header fields and event information (including line items) from the sourcing request and the **Sourcing Request Items** document.
- If you create a **Full Project** from a sourcing request, the project is populated with header fields from the sourcing request.
  - If you create a **Full Project** from a template that contains one event (or only one event based on visibility conditions), the event is populated with header fields and event information (including line items) from the sourcing request and the **Sourcing Request Items** document.
    If the full project template contains more than one event, the user is prompted to select the document (event) that the line items from the **Sourcing Request Items** document will be copied to.
  - If you create a **Full Project** you can add an ad hoc event (an event that is not inherited from the full project's template). Or, if you create a **Full Project** from a template with a document choice document, you create an event from the document choice. In these cases:
    - The event is populated with header fields from the full project.
    - You can navigate to the **Content** page for the event and choose the **Add** > **Content from Sourcing Request** option to add line items from the **Sourcing Request Items** document.

After the sourcing event (or project) is created, any change or delete requests from the ERP system has no effect on the event (or project) contents or state. SAP Ariba Sourcing sends an email notification to all active team members about the request and creates a log entry about the request.

> ⓘ Note
>
> If the sourcing request was created from the RFQ and Award Integration with SAP Ariba Sourcing feature, you must be a member of the **Integration Protected Fields Editor** group to edit field values that originated from the ERP system. However, SAP Ariba recommends that you do not edit field values that originated from the ERP system; doing so can cause the ERP to reject award data sent from SAP Ariba Sourcing.

Task overview: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Projects [page 26]

Creating Sourcing Requests from the Dashboard [page 29]
Processing Sourcing Requests Created from Integration Events [page 30]
Creating Sourcing Projects and Events from Procurement Workspaces [page 34]
Sourcing Project Fields [page 35]

Creating Sourcing Projects and Events from Procurement Workspaces

Use this procedure to create sourcing projects and events from procurement workspaces.

Context

- You must have the ability to create sourcing projects to create a sourcing project or event from a procurement workspace. The project.sourcing.create permission is required to create projects.
- If you are a procurement workspace requestor, you must be a member of the procurement workspace project team to create a sourcing project or event from a procurement workspace.

Procedure

1. Open the procurement workspace.

   For information about searching for procurement workspaces, see Finding and Opening a Project [page 55]
2. Click the **Documents** tab.
3. Click **Actions** > **Create** > **Sourcing Project**.
4. Enter the required information on the **Create Sourcing Project** page.

   For information about the fields on the **Create Sourcing Project** page and the other steps in the project or event creation process, see Creating an Ariba Sourcing Project [page 26].
5. Do either of the following in the **Project** field:
   - To create a sourcing project, select **Full Project**.
   - To create a sourcing event, select **Quick Project**.
6. Click **Create**.

Results

A link to the sourcing project or event is added to **Documents** tab of the procurement workspace. You can edit and publish the event from here.

Task overview: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Projects [page 26]
Creating Sourcing Requests from the Dashboard [page 29]
Processing Sourcing Requests Created from Integration Events [page 30]
Creating Sourcing Events from Sourcing Requests [page 32]
Sourcing Project Fields [page 35]

Sourcing Project Fields

Field	Required	Description
Name	X	Name (title) of the project. The name cannot be the name of another project in the same folder and cannot contain the following special characters: `\ / : ? “ < > | # + % &` Maximum length: 254 characters for the SAP Ariba Sourcing classic user interface; 60 characters for the guided sourcing user interface. . **Note** Do not end the project name with a period (.). Doing so causes a DFS synchronization error if you attempt to open a document in that project.
Description		Description of the project. After you create the project, you can format the project description text with bold, italic, underlining, lists, or colors by choosing **Actions** > **Edit Overview**. **Note** Only the first 50 characters of the description are included in reports.
Copy from Project		Choose a project from the pull-down menu to copy data from an existing project into the new project.
Project	X	Specifies the project type. Valid values are **Full Project** (can contain multiple sourcing events with all project management features) or **Quick Project** (a single sourcing event with limited project management features). The `Application.AQS.AllowableProjectType` site configuration parameter might be configured for your site to support only one project type and this field might not be editable.
Project State		Specifies the project state. When you are creating a project, the only valid values are **Active** and **Planned**. **Planned** indicates the project has not begun; if you select **Planned**, you can also specify a **Planned Start Date** and **Planned End Date**.

Field	Required	Description
Planned Start Date		The date you plan to start the project. This field is used only for reporting.
Planned End Date		The date you plan to end the project. This field is used only for reporting.
Test Project	X	Test projects can be used for internal testing and training. By default, reports include data from test projects but you can filter out data from test projects when creating reports (except line-item data from forms in test projects, which are not filtered by the test project field). Test projects can be deleted at any time, regardless of their state. Test projects do generate email, just as regular projects do. ⓘ Note The **Test Project** field can be modified only by team members and only while the event is in a **Draft** state. After the event is published, only users belonging to the **Sourcing Agent** group can modify the **Test Project** field. Test projects are not shown in the **Sourcing Projects** tile.
Base Language		Select a base language from the pull-down menu if you are creating the project in a language other than the language specified in your user preferences. ⓘ Note In view mode, templates and projects are displayed in the language that the user selects as their preference. In edit mode, the language displayed is that of the preference setting of the template or project. Uploaded document titles are created in the language preference defined in the template or contract workspace.
Suppliers		These are significant suppliers related to the project. You can search for and report on the suppliers listed in this field. This field can give you insight into suppliers that are currently involved in sourcing activity and future planned projects. The **Suppliers** field is present only if the site configuration parameter `Application.ACM.EnableSuppliersHeaderInSourcingProject` is set to `Yes`; SAP Ariba sets this parameter for you. You can include supplier IDs in supplier selection lists, and you can search by supplier ID, by specifying a domain with the **Show the supplier ID in the user interface** (Application.SupplierChooser.OrganizationIDDomainName) configuration parameter. For more information, see Including the Supplier ID in Supplier Selection Lists and Searching Suppliers by ID in the Event Management Guide.
Regions		The geographic regions for the project or event. The values for this field can be used to pre-populate projects and events with team members, content, and approvers specific to the region.
Departments		The departments for the project or event. This is typically used to specify the department in your organization involved in the project. The values for this field can be used to pre-populate projects and events with team members, content, and approvers specific to the department.
Resourced By		The method used to execute the project. This field is used only for reporting.

Field	Required	Description
Project Reason		Describes the reason for the project. This field is used only for reporting.
Baseline Spend		The amount you think will be spent for all goods and services in the project or event. You can use baseline spend in analytical reports to assess savings.
Target Savings %		The percentage you want to save as a result of the project. This value is not shown to participants.
Predecessor Project		Choosing a predecessor project from the **Predecessor Project** pull-down menu creates this project as a follow-on project to an existing project. Fields in the current project that are also present in the predecessor project will be pre-populated with values from the predecessor project.
Commodity		The commodities for the project or event. Your company might refer to commodities as categories, UNSPSC codes, or by another term. An example of a commodity is office supplies. The values for this field can be used to pre-populate projects with team members, content, and approvers specific to the commodity.
Owner		The project owner. The default is the user creating the project.
Currency		The currency you plan to use to buy the commodities in the project. This value becomes the event currency in any events created from the sourcing project.
Execution Strategy		Specifies the strategy you plan to use to execute the project. This field is used only for reporting.
Planned Event Type		The type of event you plan to use in the project. This field is used only for reporting.
Contract Months		The number of months that the contract based on the sourcing project will last.
Contract Effective Date		The effective date for any contract created from this project.
External System		(Visible only if your site is integrated with multiple external systems.) Name of the external system (ERP) that the project is integrated with. If item master data was imported from the external system, users can add items from this data to the event contents. If your site is integrated with only one external system, this field is not visible and the event is automatically integrated with that system. Award data from this event can be sent to the external system. For example, the data can be sent to an SAP ERP to create purchase orders, contracts, or scheduling agreements.
Company Code		(Visible only if your site is integrated with one or more external systems.) Company code that identifies the company for the event.
Purchasing Organization		(Visible only if your site is integrated with one or more external systems.) Purchasing organization for the event.
Purchasing Group		(Visible only if your site is integrated with one or more external systems.) Purchasing group for the event.
Payment Terms		(Visible only if your site is integrated with one or more external systems.) Payment terms for the event.

Field	Required	Description
Document Type		(Visible only if your site is integrated with one or more external systems.) Type of document to create on the external system when data from this event is sent to the ERP. If the external system is an SAP ERP, select **Purchase Order**, **Contract**, or **Scheduling Agreement**. If the external system is an Oracle ERP, select **Standard** (standard purchase order) or **Contract** (blanket purchase agreement or value contract).
Document Category		(Visible only if your site is integrated with one or more external systems.) Category of document to create on the SAP ERP when data from this event is sent to the ERP. • If **Document Type** is **Purchase Order**, select **NB Standard Purchase Order**. • If **Document Type** is **Contract**, select **WK Value Contract** or **MK Quantity Contract**. • If **Document Type** is **Scheduling Agreement**, select **LP Scheduling Agr. w/o release doc.** or **LPA Scheduling Agr. with release doc.**.

Parent topic: Sourcing Project and Request Creation [page 25]

Related Information

Creating Sourcing Projects [page 26]
Creating Sourcing Requests from the Dashboard [page 29]
Processing Sourcing Requests Created from Integration Events [page 30]
Creating Sourcing Events from Sourcing Requests [page 32]
Creating Sourcing Projects and Events from Procurement Workspaces [page 34]
Creating Follow-On Projects [page 104]
Copying Projects [page 96]

Creation of Procurement Workspaces and Procurement Workspace Requests

This topic is applicable only for SAP Ariba Buying and Invoicing and SAP Ariba Buying users.

You create procurement workspace requests and procurement workspaces using templates that represent your company's standard business processes and can be pre-populated with team members, documents, tasks, and other project items. The available templates can change depending on the project information (attributes) you specify. Project templates can also contain conditions that determine the documents, tasks, and phases created according to the project attributes. For information about creating project templates, see Project Template Guide.

> ⓘ Note
>
> Procurement workspace requests and procurement workspaces are created as projects on your SAP Ariba system and may also be referred to as projects in this guide and in other SAP Ariba documentation.

Procurement workspaces can be created from any of the following starting points:

- Procurement workspace requests
- The SAP Ariba dashboard
- The **Summary** page of a requisition
- An existing procurement workspace

Members of the **Procurement Project Creator** group can create procurement workspaces from any of these points. If you are not a member of the **Procurement Project Creator** group, but you are a member of the **Procurement Project Requestor** group, you must first create a procurement workspace request to propose a project. If the request is approved, you can create a procurement workspace from the request.

Before you create a project, SAP Ariba recommends that you:

- Define all of the project's requirements and make sure that the available templates meet those requirements. You might need to ask your template administrator to create additional templates.
- Select the appropriate project template.
- Consider the supplemental documents you want to include in the project.

Creating Procurement Workspace Requests [page 40]

Creating Procurement Workspaces from Procurement Workspace Requests [page 41]

Creating Procurement Workspaces from the Dashboard [page 43]

Creating Procurement Workspaces from Requisitions [page 44]

Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]

Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Parent topic: Project Creation [page 15]

Related Information

Contract Project Creation [page 15]
Sourcing Project and Request Creation [page 25]

Creating Procurement Workspace Requests

Use this procedure to create procurement workspace requests.

Prerequisites

- You must be a member of either the **Procurement Project Creator** group or the **Procurement Project Requestor** group to create a procurement workspace request.

Procedure

1. On the dashboard, click **Create** › **Procurement Workspace Request**.
2. Enter information to describe your request.

   For information about the fields on the request details page, see Procurement Workspace Request and Procurement Workspace Project Fields [page 47].
3. Select the template you want to use as the basis for your request.
4. Click **Create**.
5. Click the **Tasks** tab and do the following:
   - Under **Prepare Procurement Request** click **Mark Started** to indicate that you have started the procurement workspace request process: Click **Mark Complete** when youcomplete the request process..
   - Under **Approval for Procurement Workspace Request** to request approval for the procurement worksapce request, click **View Task Details**, and then click **Submit**.

   > Note
   >
   > These tasks may not appear on procurement workspace requests created at your organization. They are included in the out of the box procurement request template that comes with your SAP Ariba solution. The out of the box template may have been modified at your organization, or your organization may have implemented a new procurement request template.

Results

When a procurement workspace request is approved, a blank procurement workspace object is added to the **Documents** tab of the request. For information about creating the procurement workspace, see Creating Procurement Workspaces From Procurement Workspace Requests [page 41].

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.
- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.

Task overview: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspaces from Procurement Workspace Requests [page 41]
Creating Procurement Workspaces from the Dashboard [page 43]
Creating Procurement Workspaces from Requisitions [page 44]
Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]
Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Creating Procurement Workspaces from Procurement Workspace Requests

Use this procedure to create procurement workspaces from procurement workspace requests.

Prerequisites

- You must be a member of either the **Procurement Project Creator** group or the **Procurement Project Requestor** group to create a procurement workspace from a procurement workspace request.

Procedure

1. Open the procurement workspace request.

   For information about searching for procurement workspace requests, see Finding and Opening a Project [page 55].
2. Click the **Documents** tab.
3. Click the new procurement workspace object and click **Open**.

   If there is no procurement workspace object on the **Documents** tab, your organization's procurement workspace request template may not be set up with an approval task that creates this object automatically. To continue creating a procurement workspace, click the **Overview** tab and click **Actions** > **Create Follow-On Project** in the **Overview** area.
4. Enter a name for the workspace in the **Name** field.
5. Select **No** for the **Test Project** field.
6. Select the project type from the **Project Type** pull-down menu.
7. Select the pricing structure from the **Pricing Structure** pull-down menu.

   Other fields on the **Create Procurement Workspace** page may be filled in already based on information that was entered when the procurement workspace request was created. For more information about the fields on the **Create Procurement Workspace** page, see Procurement Workspace Request and Procurement Workspace Project Fields [page 47].
8. Select the template you want to use as the basis for your workspace.
9. Click **Create**.

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.
- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.

Task overview: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspace Requests [page 40]
Creating Procurement Workspaces from the Dashboard [page 43]
Creating Procurement Workspaces from Requisitions [page 44]
Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]
Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Creating Procurement Workspaces from the Dashboard

Use this procedure to create procurement workspaces from the dashboard.

Prerequisites

- You must be a member of the **Procurement Project Creator** group.

Procedure

1. On the dashboard, click **Create** > **Procurement Workspace**.
2. Enter a name for the workspace in the **Name** field.
3. (Optional) Enter a description of the workspace.
4. Select **No** for the **Test Project** field.
5. Select the project type from the **Project Type** pull-down menu.
6. Select the pricing structure from the **Pricing Structure** pull-down menu.
7. For more information about the fields on the **Create Procurement Workspace** page, see Procurement Workspace Request and Procurement Workspace Project Fields [page 47].
8. Select the template you want to use as the basis for your workspace.
9. Click **Create**.

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.
- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.

View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.

Task overview: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspace Requests [page 40]
Creating Procurement Workspaces from Procurement Workspace Requests [page 41]
Creating Procurement Workspaces from Requisitions [page 44]
Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]
Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Creating Procurement Workspaces from Requisitions

Use this procedure to create procurement workspaces from requisitions.

Prerequisites

- You must be a member of the **Procurement Project Creator** group.

Procedure

1. Create a requisition or open an existing requisition.
2. Open the **Summary** tab.
3. Click **Create Project** in the **Related Projects** field and then click **Procurement Workspace**.
4. Enter a name for the workspace in the **Name** field.
5. (Optional) Enter a description of the workspace.
6. Select **No** for the **Test Project** field.
7. Select the project type from the **Project Type** pull-down menu.
8. Select the pricing structure from the **Pricing Structure** pull-down menu.

For more information about the fields on the **Create Procurement Workspace** page, see Procurement Workspace Request and Procurement Workspace Project Fields [page 47].

9. Select the template you want to use as the basis for your workspace.
10. Click **Create**.

Results

The requisition is added to the **Requisitions** folder on the **Documents** tab of the new procurement workspace, and a link to the new workspace replaces the **Create Project** and **Add To Project** links on the requisition summary page.

Any purchase orders, receipts, or invoices that are associated with the requisition are added to the **Documents** tab of the procurement workspace automatically.

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.
- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.

Task overview: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspace Requests [page 40]
Creating Procurement Workspaces from Procurement Workspace Requests [page 41]
Creating Procurement Workspaces from the Dashboard [page 43]
Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]
Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Creating Procurement Workspaces from Existing Procurement Workspaces

Use this procedure to create procurement workspaes from existing procurement workspaces.

Prerequisites

- You must be a member of the **Procurement Project Creator** group.

Procedure

1. Open the procurement workspace.

   For information about searching for procurement workspaces, see Finding and Opening a Project [page 55].
2. Click the **Documents** tab.
3. Click **Actions** > **Create** > **Procurement Workspace**.
4. Enter a name for the workspace in the **Name** field.
5. (Optional) Enter a description of the workspace.
6. Select **No** for the **Test Project** field.
7. Select the project type from the **Project Type** pull-down menu. The value selected in the parent workspace is selected by default.
8. Select the pricing structure from the **Pricing Structure** pull-down menu. The value selected in the parent workspace is selected by default.

   For more information about the fields on the `Create Procurement Workspace` page, see Procurement Workspace Request and Procurement Workspace Project Fields [page 47].
9. Select the template you want to use as the basis for your workspace.
10. Click **Create**.

Results

The new procurement workspace is added to the **Documents** tab of the parent procurement workspace.

Next Steps

- Add team members to project groups [page 133], or create additional project groups. Depending on the template you used to create the project, some team members might already belong to the project.

- Add documents [page 139] to the project.
- Set up tasks [page 300]. You can submit any tasks inherited from the project template or create and submit new tasks.
  View the **Tasks** tab and verify that the phases and tasks associated with your project are correct, and that the order and due dates of the tasks are accurate. Check to see that team members are responsible for tasks that match their areas of expertise. Create any additional tasks that your project requires.
  Drag and drop phases and tasks on the **Tasks** tab in the order in which you intend to perform the tasks. You cannot modify or delete tasks that were provided by the template. Note that the use of predecessor tasks can change the order in which you perform tasks.
  The Completion column lists the completion dates for phases and tasks. You can set the completion date to a specific date, or base it on the start date of the task's parent phase.

Task overview: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspace Requests [page 40]
Creating Procurement Workspaces from Procurement Workspace Requests [page 41]
Creating Procurement Workspaces from the Dashboard [page 43]
Creating Procurement Workspaces from Requisitions [page 44]
Procurement Workspace Request and Procurement Workspace Project Fields [page 47]

Procurement Workspace Request and Procurement Workspace Project Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>(This field is mandatory) The project name. The name cannot be the name of another project in the same folder and cannot contain the following special characters:

<code>\ / : ? “ < > | # + % &</code>

Maximum length: 254 characters.</td></tr>
<tr><td>Description</td><td>A description of the workspace or procurement workspace request.</td></tr>
<tr><td>Copy from Project</td><td>Choose a project from the Copy from Project pull-down menu to copy data from an existing project into the new project. For more information about copying projects, see Copying Projects [page 96].</td></tr>
<tr><td>Test Project</td><td>Test projects can be used for internal testing and training. You cannot change the test project setting after you have created a project.</td></tr>
<tr><td>Base Language</td><td>The language to be used on the workspace request or workspace user interface.</td></tr>
<tr><td>Project Deliverables</td><td>The end results to be achieved by the project team.</td></tr>
<tr><td>Requirements Document</td><td>Click Attach a file to add any documents that describe the project requirements/objectives.</td></tr>
</table>

Field	Description
Project Type	The type of project. Values inherited from the out of the box Procurement Workspace Template include **IT Development**, **IT Security**, **Strategy & Analysis**, **Process Design**, **Change Management**, **Legal, HR**, **Environmental**, and **Other**.
Project Start Date	The start date of the project.
Project End Date	The end date of the project.
Pricing Structure	Choose **Fixed Fee**, **Time & Materials** or **Both**.
Project Lead	Expand the pull-down menu and select a project lead or click **Search for more** and search for a project lead.
Suppliers	Expand the pull-down menu and select a potential supplier or click **Search for more** and search for a supplier. Click the plus button to add more suppliers.
Project Location	Expand the pull-down menu and select a project location or click **Search for more** and search for a project location.
Predecessor Project	(Optional) Choose a predecessor project from the pull-down menu if there is a related project that must be completed before the current project.

Parent topic: Creation of Procurement Workspaces and Procurement Workspace Requests [page 38]

Related Information

Creating Procurement Workspace Requests [page 40]
Creating Procurement Workspaces from Procurement Workspace Requests [page 41]
Creating Procurement Workspaces from the Dashboard [page 43]
Creating Procurement Workspaces from Requisitions [page 44]
Creating Procurement Workspaces from Existing Procurement Workspaces [page 46]

Project Management

Project management features include the ability to copy, delete, move, and link projects.

How Can I Manage Projects?

SAP Ariba provides project management features that enable you to:

- Standardize workflows and processes using templates.
A project template serves as a starting point for a project. You must select a template when you create a project. Templates are usually prepopulated with documents, tasks, and team members. Template authors can also set conditions in templates to automatically display or hide content according to information such as location, commodity, or other project attributes.
SAP Ariba supplies default project templates. In solutions that include SAP Ariba Sourcing or SAP Ariba Contracts, you can copy and modify these default templates, or you can create your own templates. See Project Template Guide for details.
- Create and manage project documents.

Projects provide centralized storage places where users can store and manage multiple versions of project documents. You can include documents in project templates to standardize their use across projects.

- Organize and standardize workflows.
  You can configure tasks as milestones, predecessor tasks, and follow-on tasks to standardize workflows and ensure that parts of the project are completed before others start.
- Use group-based access control.
  With group-based project access controls, users are assigned to groups. Groups have roles that control permissions for resources and actions. Users can be assigned to multiple groups, and therefore can have multiple roles. You can set up access control so that users share some but not all permissions.
  Groups can be defined per project or globally for your site.
  You can define groups and assign groups for tasks and access control in a template. Template group definitions and assignments are inherited by all projects created using the template, allowing you to standardize project team membership.
  You can also create a team member rules file for a template that specifies the groups and users for projects based on different project attributes such as commodities and geographic locations.
- Collect standard information using forms.
  Forms are customized data-entry documents. If your SAP Ariba solution includes forms, you can create form documents in projects from your company's custom templates to collect information. You can also prepopulate project templates with form documents to standardize information-collecting across projects.
- Send email notifications.
  You can configure the system to send email to notify users when projects are started, completed, or modified and when users are assigned to tasks.
- Review and approve documents from mobile devices.
  Offline users can use email to complete review and approval task for documents without signing in to SAP Ariba. Users can also select the format used in the email notifications for review and approval tasks that is best suited for their mobile device.
- Provide users quick visibility to projects and tasks.
  SAP Ariba provides an easy-to-use graphical user interface, or dashboard, that organizes projects, events, tasks, and frequently used information.
- Search for projects and documents.
  SAP Ariba provides a powerful search mechanism that enables you to quickly search and locate projects and documents. You can search for projects based on attributes such as geographic location, commodity type, and creation date. You can also search for text strings within document contents and document names.
  The search feature also enables you to save and reuse searches.
- Automatically download system document files to your desktop and upload locally edited files to the system.
  SAP Ariba provides the Desktop File Sync (DFS) feature which enables you to easily use the centralized file storage provided by SAP Ariba with efficient local file editing. When DFS is enabled, opening a document stored in the SAP Ariba system downloads a new version of the file to the user's desktop if the user does not have the latest version of the document. If a user modifies his or her local copy of the document, the system detects the change and asks if the user wants to create a new version of the file in the system by uploading the local file.
- Integrate project tasks with Microsoft Project and Microsoft Outlook.
  You can import and export tasks from SAP Ariba to Microsoft Project. You can also export tasks from SAP Ariba to Microsoft Outlook.
- Automatically track savings.
  If you have both SAP Ariba Sourcing and SAP Ariba Contracts, you can create savings tracking forms to automatically track savings for procurement contracts that are or will be associated with sourcing projects. You can track multiple types of savings, including negotiated, implemented, and actual savings
- Create reports.

You can create reports about contract projects using data from multiple contract fields that is filtered, sorted, and compared in multiple formats.

- Integrate SAP Ariba with your company's enterprise resource planning (ERP) systems.
  You can export and data from SAP Ariba to your ERP systems and vice-versa. For more information, see Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions and SOAP Web Service API Integration Guide.
- Create PDF files.
  You can create a PDF file from one or more documents in a project. This enables you to assemble a single PDF file that incorporates multiple files, such as multiple files used for a contract. Numerous file types are supported as input files, including text, Microsoft Word, and Microsoft Excel. For a complete list of supported file types, see Assembled PDF Documents [page 273].
  PDF file creation is an add-on feature to SAP Ariba solutions.

Additional Features for SAP Ariba Sourcing Projects [page 52]

Additional Features for SAP Ariba Contracts Projects [page 52]

Additional Features for Procurement Workspaces [page 54]

Parent topic: Project Management [page 49]

Related Information

Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Management of Non-Disclosure Agreement Contracts [page 80]
Creation and Management of Knowledge Projects [page 85]
Setting Access Controls on Projects and Documents [page 93]
Copying Projects [page 96]
Moving Projects [page 99]
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Project Linking [page 102]
Creating Hyperlinks to Projects and Documents [page 109]
Creating a Task for an Entire Project [page 111]
Viewing and Managing Project Announcements [page 112]
Creating Quick Surveys [page 113]
Viewing a Project's Activity History [page 116]
Exporting Tasks to Microsoft Outlook [page 118]
Integration of SAP Ariba Projects with Microsoft Project [page 120]

Additional Features for SAP Ariba Sourcing Projects

In addition to the features listed in Project Management Features [page 49], SAP Ariba Sourcing supports features that enable you to:

- Define relationships between SAP Ariba Sourcing full projects.
  You can create the following relationships between SAP Ariba Sourcing full projects:
  - Subprojects: a subproject is tightly linked to its parent project. The subproject is contained in the parent project and inherits team members and multiple attributes from it. You can create permanent links from fields in a parent project to subproject fields so that changes in the parent project are automatically propagated to the subproject.
  - Follow-on project: A follow-on project is a project that can inherit field values, but has no permanent links to the predecessor project.
- Manage multiple related events a single SAP Ariba Sourcing full project.
  A single SAP Ariba Sourcing full project can contain multiple events, such as an RFI and an auction.
- Track upcoming projects.
  You can designate planned projects using the **Planned** state so that you can keep track of upcoming projects for the quarter or year and allocate resources for future projects.

Parent topic: How Can I Manage Projects? [page 49]

Related Information

Additional Features for SAP Ariba Contracts Projects [page 52]
Additional Features for Procurement Workspaces [page 54]

Additional Features for SAP Ariba Contracts Projects

In addition to the features listed in Project Management Features [page 49], SAP Ariba Contracts supports features that enable you to:

- Standardize contract text using a **clause library**.
  SAP Ariba Contracts also enables you to create and manage a clause library. The **clause library** is a tool for storing and managing paragraphs of text for contracts as contract clauses. The **clause library** enables your organization to standardize and regulate text used in contracts while providing the ability for contract authors to select and exchange clauses as needed.
  The **clause library** also enables you to manage clause versions and to automatically require approvals when text in clauses is changed. You can also create templates that automatically select clauses according to information such as contract region or commodity type.
  For more information about using a clause library, see Clause Library.
- Compare and manage contract document versions.
  SAP Ariba Contracts includes features to manage and compare document versions. SAP Ariba Contracts is integrated with the Microsoft Word change tracking feature so you can easily view, accept, or reject contract text changes.

- Send email notifications for contract expirations.
  You can configure SAP Ariba to send email messages that notify users before contracts expire (in addition to the email notifications sent for project changes and tasks).
- Create contracts with different term types.
  SAP Ariba Contracts supports the following contract term types:
  - **Fixed**: Contracts for a fixed time period and no renewals.
  - **Perpetual**: Contracts with no expiration date.
  - **Auto Renewal**: Contracts that can be automatically renewed. Users specify the renewal interval and maximum number of renewals.
- Define relationships between contract workspaces.
  You can define or create the following relationships between contract workspaces:
  - Subproject: A subproject is tightly linked to its parent project. The subproject is contained in its parent project and inherits team members and multiple fields from its parent project. You can create permanent links from fields in a parent project to a subproject fields so that changes in the parent project are automatically propagated to the subproject.
  - Follow-on project: A follow-on project is a project that can inherit field values, but has no permanent links to the predecessor project.
  - Master agreement and subagreement: Master agreements and subagreements define relationships between contract projects that help you organize and view related contracts.
- Sign PDF documents using electronic signatures.
  Electronic signatures enable you to obtain signatures quickly and securely without requiring physical distribution of a paper document.
- Include a contract line items documents with item and pricing information, such as quantity and price.
- Create contract workspaces directly from an SAP Ariba Sourcing event award.
  If your company has licensed SAP Ariba Sourcing in addition to SAP Ariba Contracts, you can create a new contract workspace directly from an SAP Ariba Sourcing event award. Contract workspaces created from SAP Ariba Sourcing event awards include commodity, region, supplier or customer, effective date, and expiration date information from the event. The contract workspace can also contain a contract line items document with items and pricing terms from the event.
  For details on creating contract workspaces from the SAP Ariba Sourcing **Award** tab, see Event Management Guide.
- Create **Contract Compliance** contract requests.
  If you have SAP Ariba Procurement solutions integrated with SAP Ariba Contracts, you can use SAP Ariba Contracts to create a compliance contract request that contains pricing terms from information in the SAP Ariba Contracts workspace (a contract line items document or pricing terms Excel file).
  For more information about integreting with contract compliance, see Managing Contract Spending from Contract Workspaces.

Parent topic: How Can I Manage Projects? [page 49]

Related Information

Additional Features for SAP Ariba Sourcing Projects [page 52]
Additional Features for Procurement Workspaces [page 54]

Additional Features for Procurement Workspaces

In addition to the features listed in Project Management Features [page 49], procurement workspaces enable you to:

- Track the real-time status of associated requisitions from the procurement workspace.
- Track total ordered project spend.
- Track total invoiced spend.
- Create requisitions, contract workspaces, supplier performance management projects, and sourcing events from the procurement workspace.
- Navigate from a procurement workspace to an associated document and return to the workspace using the back button on the SAP Ariba Buying solution. For example, you can now open a requisition from within a procurement workspace and use the back button on the SAP Ariba Buying solution to return to the workspace **Documents** tab.
- View Supplier Risk Exposure with Custom Risk Categories.
  If your site has SAP Ariba Contracts integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, you can view supplier risk exposure data in contract workspaces through custom risk categories.
  The custom risk categories can include supplier risk exposure data from various sources such as customer data, external data from third-party providers, and so on. You can have up to 25 active custom risk categories per site. The custom risk category data is displayed in the user's country/region format.

Parent topic: How Can I Manage Projects? [page 49]

Related Information

Additional Features for SAP Ariba Sourcing Projects [page 52]
Additional Features for SAP Ariba Contracts Projects [page 52]

Project Accessing and Viewing

If you are not the project owner, your first introduction to a project normally arrives with an email notifying you are a member of a project team group. In some cases, you access the project using a direct hyperlink that someone has provided to you; see Creating Hyperlinks to Projects and Documents [page 109] for details on these hyperlinks. In others, you access the project by signing into SAP Ariba and clicking the project name to open it.

The **To Do** dashboard content item lists your project tasks that are due in the current week. Click the name of a task to see task details. Click the refresh icon (↻) to update **To Do** content.

Finding and Opening a Project [page 55]

Changing the Project View [page 57]

Viewing Detailed Project Overview Information [page 58]

Adding or Removing a Project from the Watched Projects Portlet [page 60]

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Field Edits [page 62]
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Finding and Opening a Project

Use this procedure to find and open a project.

Context

For additional information about searching for projects, see the topic Searching for Projects, Documents, or Project Templates in the Searching, Completing Tasks, and Other Common User Actions guide.

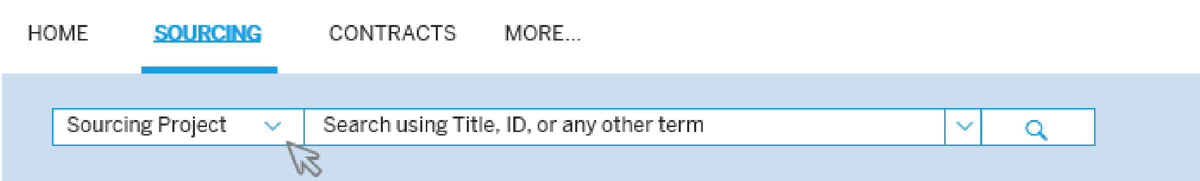
> ⚠ Restriction
>
> There can be a delay between the time a project or event is created and the time the project or event and project contents appear in search results and on the dashboard. Similarly, there can be a delay between the time data (project fields, event fields, or documents) is modified, added, or deleted and the time the modifications are reflected in search results and on the dashboard.

To enable users to search for projects using a custom project field as a filter, contact your account representative and reach out to the SAP Services team.

For more information, visit the SAP Store.

Procedure

1. On the SAP Ariba dashboard search bar, click the content type menu to the left of the search field and select the type of project you want to open. For example, **Sourcing Project**,**Contract Workspace (Procurement)**, **Procurement Workspace Request**, or **Procurement Workspace**.



2. **Optional:** Enter the title of the project or other search terms in the search box.

   The search terms are used for free-text, "begins-with" search to look for words that begin with the terms.

   When entering text for searches, you can:
   - Enter the beginning text of a word you are searching for. SAP Ariba supports begins-with text matching and looks in all searchable fields for words or groups of words that begin with the search strings you entered. For example, searching for projects with the text **AAA** matches projects with the title **AAAB** but not **BAAA**.
   - Enter multiple words, separated (delimited) by spaces, hyphens (**-**), or underscores (_). If you specify multiple words, the search engine searches for documents or fields that contain all the words somewhere within them. To search for words in an exact sequence, enclose the sequence in double quotes (**"**).
     Each group of characters in the search string is treated separately. For example, you enter the following search string:
     123 Proj
     The results include projects and documents with matching strings such as:
     - **1234 Proj**
     - **123 Project**
     - **Project 1234**

     However, the search results would not include projects or documents with the strings **0123 Proj**.
     The space, hyphen, and underscore delimiters are also applied to the text being searched. For example, the text string **AAA_BBB** can be found by specifying **BBB** as a search term (**AAA_BBB** is stored as two strings, **AAA** and **BBB**). Similarly, the text strings **01-2016**, **02-2016**, and**03-2016** can all be found by searching for **2016**.
   - Disregard capitalization in most cases. For example, searching for **super** is the same as searching for **SUPER** or **Super**. However, transitions from lowercase to uppercase split the search term and text that is searched. For example, you can find a project with the title **superStar** by searching for **star**. If you enter **superStar** as a search term, it's equivalent to entering the two search terms **super** and **star**; it only matches projects or documents that have both the word **super** and the word **star** (or a word that begins with **super** and another word that begins with **star**).
   - Use the Boolean operator **or** between two search terms (the Boolean operator **and** is applied by default).

3. Press `Enter` or click the search icon (🔍) to start the search.
4. The **Search Projects** page opens with search results. You can start also enter search terms on this page. Enter the title of the project or other search terms in the unlabeled search box for a global search across all searchable project fields.
5. **Optional:** To add a field filter, click the plus (**+**) button.

   A field filter enables you to search for values in a specific project or document field (such as the **ID** field). When you click the (**+**) button, the SAP Ariba solution adds a commonly used search field filter (such as **ID**) to the page. To change the field filter, click the field's pull-down arrow, and select a different field.
6. Click **Search**.
7. Click the title of the project and choose **Open**.

Task overview: Project Accessing and Viewing [page 54]

Related Information

Changing the Project View [page 57]
Viewing Detailed Project Overview Information [page 58]
Adding or Removing a Project from the Watched Projects Portlet [page 60]
Viewing Supplier Risk Exposure with Custom Risk Categories in Contract Workspaces [page 61]

Changing the Project View

Use this procedure to change the project view.

Context

SAP Ariba can display a project using a compact view or a full view.

In a compact view, SAP Ariba contains content areas with compact (abridged) information about the following project items:

- **Overview** (general information about the project, such as the description
- **Tasks** (displayed for SAP Ariba Sourcing and SAP Ariba Contracts projects only)
- **Documents** (displayed for SAP Ariba Sourcing and SAP Ariba Contracts projects only)
- **Announcements** (displayed for SAP Ariba Sourcing and SAP Ariba Contracts projects only)
- **Profile** (displayed for SPM projects only)
- **Contract Attributes** and **Contract Term Attributes** (displayed for SAP Ariba Contracts projects only)

In a full view, SAP Ariba displays full information about one project area with tabs that users can click to change the project area displayed.

Procedure

1. Navigate to the **Overview** area for the project.
2. Choose **Actions** > **Display** > **Full View** or **Actions** > **Display** > **Compact View**.

Task overview: Project Accessing and Viewing [page 54]

Related Information

Finding and Opening a Project [page 55]
Viewing Detailed Project Overview Information [page 58]
Adding or Removing a Project from the Watched Projects Portlet [page 60]
Viewing Supplier Risk Exposure with Custom Risk Categories in Contract Workspaces [page 61]

Viewing Detailed Project Overview Information

Use this procedure to view detailed project overview information.

Context

The detailed overview information for a project enables you to view project information and perform actions that affect the entire project, including:

- Creating a task, such as a review task, for the entire project
- Viewing project properties, such as the owner and access controls
- Moving the project to a different folder
- Creating a new version of the project
- Viewing the project's version history

Procedure

1. Navigate to the project **Overview** area.
2. Choose **Actions** > **View Details**.

Results

The detailed overview information for a project contains the following tabs:

- **Overview**
- **Documents**
- **Version History**

Overview Tab

The **Overview** tab contains two areas: **Properties** and **Tasks**. From the **Properties** area of the **Overview** tab, you can:

- View project information such as owner, access control, status, and base language.
- Use the **Actions** pull-down menu to edit overview attributes and perform actions that affect the entire project, such as:
  - Move the project to a different folder. See Moving Projects [page 99].
  - Lock and unlock all project documents. The lock is an advisory lock only; any user with access to locked document can navigate to the Documents area and click on the lock icon for the document and unlock the document.
  - Save a new version of the project. This is not applicable to Supplier Performance Management supplier workspaces; supplier workspaces are unique to individual suppliers, so you cannot save them as new versions.

From the **Tasks** area of the **Overview** tab, you can use the **Actions** pull-down menu to create a new task for the entire project. See Creating a Task for an Entire Project [page 111] for more information.

Documents Tab

On the **Documents** tab, you can view a list of documents associated with the project.

Version History Tab

On the **Version History** tab, you can view the project's version history. If this is an SAP Ariba Contracts workspace, this information includes amendment history.

Task overview: Project Accessing and Viewing [page 54]

Related Information

Finding and Opening a Project [page 55]
Changing the Project View [page 57]
Adding or Removing a Project from the Watched Projects Portlet [page 60]
Viewing Supplier Risk Exposure with Custom Risk Categories in Contract Workspaces [page 61]

Adding or Removing a Project from the Watched Projects Portlet

Use this procedure to add or remove a project from the watched projects portlet.

Context

Watched projects are projects that require your attention. Your company should define what constitutes a watched project. For example, your company might use the watched projects list to call attention to projects that represent a large amount of spend or that are important for meeting key company goals. If you have SAP Ariba Supplier Management projects, you can add projects for your favorite suppliers to the watched projects list.

The **Watched Projects** content item on the dashboard displays a list of watched projects so that you can open them quickly from the dashboard.

Procedure

1. Navigate to the project's **Overview** tab in either full or compact view.
2. If you are using SAP Ariba Sourcing or Supplier Performance Management, navigate to the **Process** area. If you are using SAP Ariba Contracts, navigate to the **Overview** area.
3. Click **Add to Watched Projects** to add the project to the **Watched Project** list; click **Remove From Watched Projects** to remove the project from the list.

Task overview: Project Accessing and Viewing [page 54]

Related Information

Finding and Opening a Project [page 55]
Changing the Project View [page 57]
Viewing Detailed Project Overview Information [page 58]
Viewing Supplier Risk Exposure with Custom Risk Categories in Contract Workspaces [page 61]

Viewing Supplier Risk Exposure with Custom Risk Categories in Contract Workspaces

Use this procedure to view supplier risk exposure data in contract workspaces through custom risk categories.

Prerequisites

- Your administrator must enable the **Enable custom risk categories** (`Application.SR.Risk.EnableCustomRiskCategories`) ICM parameter. For more information about this parameter, refer to Enable custom risk categories.
- Custom categories for supplier risk exposure must be imported to your site master data. For more information, refer to Custom Category Site Master Data Import.
- Category weights and thresholds must be set for the active custom categories. For more information, refer to Setting Category Weights and Thresholds for Custom Categories.

Context

If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, you can view the risk exposure data of suppliers added to contract projects of type **Contract Request (Procurement)** and **Contract Workspace (Procurement)** through custom risk categories.

Procedure

1. Create a contract project of type **Contract Request (Procurement)** or **Contract Workspace (Procurement)**.

   For information about creating contract projects, refer to Creating Contract Projects [page 16].
2. In the **Contract Attributes** section of the contract workspace, move the cursor over the **Risk Score** value calculated for a supplier.

   A popup appears showing the risk exposure of the corresponding supplier mapped to custom risk categories. There can be up to 25 custom risk categories showing the risk exposure of the supplier. The weights assigned to each risk category is based on the risk exposure model of your organization.

Task overview: Project Accessing and Viewing [page 54]

Related Information

Finding and Opening a Project [page 55]
Changing the Project View [page 57]

Viewing Detailed Project Overview Information [page 58]
Adding or Removing a Project from the Watched Projects Portlet [page 60]

Project Field Edits

Project fields appear at the top of projects and are sometimes referred to as "project header fields." Project fields generally apply to all the contents of the project.

Editing Project Fields [page 63]

Editing Contract Dates (Terms) and Notification Schedules [page 65]

Changing Responses to Template Questions [page 67]

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Management of Non-Disclosure Agreement Contracts [page 80]
Creation and Management of Knowledge Projects [page 85]
Setting Access Controls on Projects and Documents [page 93]
Copying Projects [page 96]
Moving Projects [page 99]
Deleting Projects [page 100]
Project Linking [page 102]
Creating Hyperlinks to Projects and Documents [page 109]
Creating a Task for an Entire Project [page 111]
Viewing and Managing Project Announcements [page 112]
Creating Quick Surveys [page 113]
Viewing a Project's Activity History [page 116]
Exporting Tasks to Microsoft Outlook [page 118]
Integration of SAP Ariba Projects with Microsoft Project [page 120]

Editing Project Fields

Use this procedure to edit project fields.

Context

Project fields appear at the top of projects and are sometimes referred to as "project header fields." Project fields generally apply to all the contents of the project.

You can edit several project fields from the **Overview** area, including:

- **Project name**
- **Description**
- **Owner**

  > ⓘ Note
  >
  > The value for the **Owner** field must be a user. You cannot specify a group in the **Owner** field.

- **Commodity**
- **Regions**
- **Departments**
- **Access Control** (see Setting Access Controls on Projects and Documents [page 93] for details on access control)

For sourcing projects, project fields also include spend and savings information, such as:

- **Baseline Spend**
- **Target Savings**
- **Actual Saving**
- **Execution Strategy**
- **Project Status**

For SPM projects, project fields also include:

- **Project State**
- **Project Status**

For supplier workspaces, approval status can only be changed by a member of the **Supplier/Customer Manager** group or other user who has permission to approve or reject the supplier.

For contract workspaces, you can also edit the following fields in the **Contract Attributes** and **Contract Term Attributes** areas:

Contract Attributes fields, including:

- **Hierarchical Type**
- **Term Type**
- **Contract Amount**
- **Supplier** (for procurement workspaces)

- **Customer** (for sales workspaces)
- **Agreement Date**
- **Engagement Request Project** (for procurement workspaces on sites that have the SAP Ariba Supplier Risk solution integrated with SAP Ariba Contracts)

Contract Term Attributes fields:

- **Effective Date**
- **Expiration Date**
- **Term Type**
- Parameters and recipients for email notifications sent based on to the **Expiration Date**. See Editing Contract Dates (Terms) and Notification Schedules [page 65] for additional information.

> ⓘ Note
>
> You cannot edit the **Start Date** and **End Date** for projects. The **Start Date** is set to the date the project was created. The **End Date** is set to the date at which the last task in the project was marked completed.

Procedure

1. To modify project fields, navigate to the **Overview** area and choose **Actions** > **Edit Overview**.
2. To modify contract attributes in contract workspaces, navigate to the **Contract Attributes** area and choose **Actions** > **Edit Attributes**.
3. To modify contract term attributes in contract workspaces, navigate to the **Contract Term Attributes** area and choose **Actions** > **Edit Term Attributes**.
   For additional information about contract term attributes, see Editing Contract Dates (Terms) and Notification Schedules [page 65]
4. Modify the appropriate fields and click **OK**.

Task overview: Project Field Edits [page 62]

Related Information

Editing Contract Dates (Terms) and Notification Schedules [page 65]
Changing Responses to Template Questions [page 67]

Editing Contract Dates (Terms) and Notification Schedules

Use this procedure to edit contract dates and notification schedules.

Context

This topic is applicable to SAP Ariba Contracts only.

You can modify or configure the following contract terms:

- **Effective Date**
- **Expiration Date**
- **Term Type**
- Parameters and recipients for email notifications based on the **Expiration Date** date.

Expiration and Notices Email Notifications

You can configure SAP Ariba to automatically send email notifications before contract workspaces expire. There are two types of contract email notifications:

- **Expiration**
- **Notice**

The two types enable you to send notifications to different groups using different schedules. For example, you can send expiration email notifications to remind a legal group to review the contract terms and send notice email notifications to remind a sourcing team to begin evaluating suppliers for the next contract.

Expiration and notice email notification schedules are both based on the contract expiration date. Contract notice email notifications have an additional offset, the **Notice Period**, which is a specified number of days before the expiration date.

For **Auto Renew** contract workspaces, you specify scheduling attributes relative to the expiration date for each renewal interval; SAP Ariba sends email notifications for each renewal interval.

SAP Ariba sends expiration and notice email notifications only when the contract status is **Published**. SAP Ariba does not send these email notifications when the contract status is **Draft Amendment**.

By default, SAP Ariba sends the email notifications in HTML format. You can configure alternate formats for use with PDAs and mobile devices. For more information, see Site Configuration Options for Email Notifications.

> ⓘ Note
>
> By default, SAP Ariba does not send expiration and notice email notifications for contract requests. This behavior is determined by the site configuration option `Application.ACM.EnableContractRequestExpirationAndNoticeEmail`. (Site configuration options are set for you by SAP Ariba. For more information about this option, see Site Configuration Options for Contract Term Notifications [page 428].)

Procedure

1. Open a contract project and navigate to the **Contract Term Attributes** area.
2. Choose **Actions** > **Edit Term Attributes**.
3. Enter a value for **Expiration Date** if a value is not already specified.
4. For expiration notifications, specify information for the following fields:

Field	Description
Expiration Email Recipients	Specifies the users to receive the email notifications in addition to the project owner.
Email Notification: First Sent	Specifies when SAP Ariba sends the first expiration email notification. SAP Ariba sends the notification the specified number of days before the contract expiration date. For Auto Renew contract workspaces, SAP Ariba sends email notifications for each contract expiration date (for each renewal interval).
Email Notification: Reminder Sent	Specifies how often SAP Ariba sends reminder expiration email notifications after the first notification.

5. For notice email notifications, specify information for the following fields:

Field	Description
Notice Period	Specifies the number of days before the expiration date when the project enters the notice period. SAP Ariba calculates the first day of the notice period, or the notice date, by subtracting this value from the expiration date. The notice period must be greater than zero to send notice email notifications and to access the other notice email notification fields. The Notice Period and notice date are attributes of the project and do not have to match any definitions or values for these terms specified in the text of any contract documents. **Note** The out-of-the-box (OOTB) field **Notice Period (in days)** is currently not supported by the Contract Workspace Modification API. You can update or modify this field directly through the SAP Ariba solution's user interface (UI).
Notice Email Recipients	Specifies the users to receive the email notifications in addition to the project owner.
Notice Email Notification: First Sent	Specifies when SAP Ariba sends the first notice email notification. SAP Ariba sends the notification the specified number of days before the notice date. For Auto Renew contract workspaces, SAP Ariba sends email notifications for each notice date (for each renewal interval).
Notice Email Notification: Reminder Sent	Specifies how often SAP Ariba sends reminder notice email notifications after the first notification.

Task overview: Project Field Edits [page 62]

Related Information

Editing Project Fields [page 63]

Changing Responses to Template Questions [page 67]

Changing Responses to Template Questions

Use this procedure to change responses to template questions.

Context

The template used to create your project can be customized to include questions. Responses to questions can cause conditional content to be added to a project. For example, a template could include a question such as, `Does this project require VP approval?` If you respond `Yes`, additional tasks or documents can be automatically added to your project.

Changing your response to a template question can also cause a condition to no longer be true and conditional content might be removed from a project. In general, only conditional content that has not been updated or modified, including tasks that have not been submitted, is removed when a response to a question causes a condition to no longer be true. For more information on conditional content in templates, see Project Template Guide.

Procedure

1. Navigate to the **Overview** area.
2. Choose **Actions** > **Edit Overview**.

   SAP Ariba displays a page with the following tabs: **Overview** and **Template Questions**.
3. Select the **Template Questions** tab. SAP Ariba displays the template questions and the current responses.
4. Use the pull-down menus for the responses to select different values.
5. Click **OK**.

Task overview: Project Field Edits [page 62]

Related Information

Editing Project Fields [page 63]
Editing Contract Dates (Terms) and Notification Schedules [page 65]

Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces)

SAP Ariba Contracts workspaces typically have the following life cycle:

- A workspace is created. The workspace is in the **Draft** state. During this time, documents are added and edited, and tasks are submitted and completed.
- The workspace is published. The workspace and its documents cannot be modified.
- If users want to modify a published workspace, the workspace must be amended. When modifications are complete, the amended workspace can be published again, or the amendment is completed, depending on the type of amendment.
- If the contract term type is **Fixed** or **Auto Renew**, the contract expires on its expiration date.

You can also:

- Put a workspace on hold to suspend work on the contract.
- Manually close a workspace prior to its expiration date (or at any time if its term type is **Perpetual**). The contract cannot be modified and the only notifications sent are for notification tasks (no notifications are sent for approval, review, or to do tasks; no notifications are sent for contract expirations).

Publishing Contract Workspaces [page 69]

Amendment of Contract Workspaces [page 70]

Application of New Project Template Versions with Contract Amendments [page 73]

Amending a Published Contract Workspace [page 75]

Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]

Closing Contract Workspaces [page 78]

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Management of Non-Disclosure Agreement Contracts [page 80]
Creation and Management of Knowledge Projects [page 85]
Setting Access Controls on Projects and Documents [page 93]
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Project Linking [page 102]
Creating Hyperlinks to Projects and Documents [page 109]

Publishing Contract Workspaces

Use this procedure to publish contract workspaces.

Context

To publish an SAP Ariba Contracts workspace, all required tasks must be complete. Project documents can be either **Published** or in the **Draft** state and ready for publication.

Procedure

1. Navigate to the **Contract Attributes** area.
2. Choose **Actions** > **Publish**.

Results

After you publish a contract workspace:

- You must amend the contract workspace to modify it. For information about amending contract workspaces, see About Amending Contract Workspaces [page 70].
- SAP Ariba Contracts sends expiration and notice period notifications according to the configured schedule. (SAP Ariba Contracts does not send expiration or notice period notifications if a project is not in the published state.)
- SAP Ariba Contracts finalizes any assembled contract documents that have the **Autofinalize on Publish** option selected.

Next Steps

If your workspace contains a line items document and you are integrated with one or more external systems, you can send contract data from the workspace and line items document to an external system. For more information, see Assembled PDF Documents [page 273].

Task overview: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

Amendment of Contract Workspaces [page 70]
Application of New Project Template Versions with Contract Amendments [page 73]
Amending a Published Contract Workspace [page 75]
Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]
Closing Contract Workspaces [page 78]

Amendment of Contract Workspaces

This topic is applicable only to SAP Ariba Contracts workspaces.

After you complete and publish a contract workspace, you can only change it by amending it. When you create an amendment, the contract status changes to **Draft Amendment** (unless you create an **Administrative** or **Price Update** amendment, as described below). SAP Ariba sends contract expiration or notice email notifications (notifications scheduled according to the contract notice period) for contracts in **Draft Amendment** status only if the expiration dates in the last published version and the draft amendment version are the same.

You must have **Project Owner** capabilities to amend a contract workspace.

Amendment types allow you to specify why the published contract was changed. The types are:

- **Amendment**: Allows you to change any part of the project. Changing a document that is associated with a task that is set to repeat for each draft reactivates the task.
- **Renewal**: Allows you to change the effective date, expiration date, and reminder settings.
- **Termination**: Allows you to change the expiration date and reminder settings. Use this amendment type to close a contract before its expiration date due to an adverse condition or disagreement. This amendment type is not available for **Closed** or **Expired** workspaces.
- **Price Update**: Allows you to change existing items in the contract line items document (you can edit existing items but cannot delete or add items). Note that when line items from a sourcing event are added to an existing contact, the amendment type is automatically set to **Price Update**. In such cases, if no CLID is available in the contract workspace, the items are added to the pricing terms Excel document.
- **Administrative**: Allows you to change non-contract details, such as adding a team member or uploading a supplemental document (not a contract line items document or terms file). By default, you can also change the following fields in the **Overview** area:
    - **Name**

- **Description**
- **Owner**
- **Access Control**

Your site can also be configured to make the following contract attribute fields fields editable in an **Administrative** amendment:

- **Ad hoc Spend Users** (present for Combined spend contract workspaces)
- **Affected Parties**
- **Agreement Date**

For information about the different fields that you can modify with each of these amendment types, see Editable Fields with Different Amendment Types [page 72].

Depending on your SAP Ariba solution's configuration, you might see additional differences for each amendment type as follows:

- **Amendment**, **Renewal**, and **Termination** Amendments
  If you create an **Amendment**, **Renewal**, or **Termination** amendment, the contract status changes to **Draft Amendment**. If the workspace has a task that is repeated for each new draft of the workspace, a new round of the task is created.
  When you are done making changes, you re-publish the workspace.
  If your SAP Ariba Contracts solution is integrated with SAP Ariba Procurement solutions, each **Amendment** or **Renewal** amendment of a contract workspace that contains a **Contract Terms** document also triggers a new version of the corresponding contract in SAP Ariba Procurement solutions. The **Contract Term Attributes** during renewal amendment indicate the contract period for which the contract is applicable.
- **Amendment**, **Renewal**, and **Termination** Amendments
  If you create an **Administrative** or **Price Update** amendment, the contract status does not change (the status is still **Published**). If the workspace has a task that is repeated for each new draft of the workspace, no new rounds of the task are created.
  When you are done making changes, you complete the amendment. However, completing an **Administrative** or **Price Update** amendment causes project state change notifications to be sent as if the workspace was published and any events triggered by the publication of a workspace will occur. Completing an **Administrative** or **Price Update** amendment also increments the version number for the workspace.

Workspace Versions

Creating an amendment does not affect the status or version number of the documents in the workspace. A new version of the project is not created until you publish an amended project or you complete an administrative amendment; when the new version is created, the workspace version number is incremented.

SAP Ariba increments the workspace version number when you publish the amended workspace or complete the administrative amendment.

To view a list of all versions and amendments, navigate to the project **History** tab. Click an amendment name to view the amendment reason text.

Parent topic: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

[Publishing Contract Workspaces [page 69]]
[Application of New Project Template Versions with Contract Amendments [page 73]]
[Amending a Published Contract Workspace [page 75]]
[Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]]
[Closing Contract Workspaces [page 78]]

Editable Fields with Different Amendment Types

The following table lists the standard fields in your contract workspace that can be edited with each amendment type. Note that the **Contract Term Attributes** fields refer to contract term (time period) fields in contract workspaces. These fields are unrelated to contract terms documents.

Amendment Type	Editable Contract Workspace Fields
Renewal	• Overview > Name • Overview > Description • Overview > Owner • Contract Term Attributes > Term Type • Contract Term Attributes > Effective Date • Contract Term Attributes > Expiration Date
Amendment	• Overview > Name • Overview > Description • Overview > Owner • Contract Term Attributes > Term Type • Contract Term Attributes > Effective Date • Contract Term Attributes > Expiration Date • Contract Attributes > Hierarchical Type • Contract Attributes > Proposed Contract Amount • Contract Attributes > Contract Amount • Contract Attributes > Supplier • Contract Attributes > Affected Parties • Contract Attributes > Agreement Date
Administrative	• Overview > Name • Overview > Description • Overview > Owner
Termination	• Overview > Name

Amendment Type	Editable Contract Workspace Fields
	• Overview > Description • Overview > Owner • Contract Term Attributes > Expiration Date

Application of New Project Template Versions with Contract Amendments

You can update the project with items from the latest published version of the template when you create an **Amendment**, **Renewal**, or **Termination** amendment. This feature is intended to be used for updating contracts that were loaded using the **Import Legacy Contracts** operation.

You can also perform a template upgrade to add or update tasks, documents, phases, or groups or members of the project teams in an updated template to the contract workspace. You can add new user groups or new members to existing user groups in a contract workspace template and do a template upgrade at the contract workspace-level to populate the newly-added user groups or users to the contract workspace.

The behavior for the template version upgrade feature is determined by the following ICM parameters:

- `Application.ACM.EnableTemplateVersionUpgrade`
- `Application.ACM.AskBeforeTemplateVersionUpgrade`
- `Application.ACM.FullTemplateVersionUpgrade`
- `Application.ACM.TemplateVersionUpgradeKeepPreviousAnswer`
- `Application.ACM.TemplateUpgradeForContractWorkspacesWithAssembledDocuments` .
- `Application.ACM.TemplateUpgradeForDocumentTask`

For more information about these site configuration options, see Site Configuration Options for Contract Amendments [page 425].

The SAP Ariba solution updates a project being amended if the following conditions are met:

- The template version upgrade feature is enabled (`Application.ACM.EnableTemplateVersionUpgrade` is set to `Yes`).
- The parameter `Application.ACM.AskBeforeTemplateVersionUpgrade` is `No`, or this parameter is `Yes` and the user selected the **Upgrade Template Version** option on the **Amend** page.
- The user selected an **Amendment**, **Renewal**, or **Termination** amendment type.
- There is a new version of the project template.
- The contract workspace does not include any assembled contract documents (Main Agreement or Contract Addendum documents).

Responses to Template Questions

By default, applying a template upgrade after an amendment clears any previous responses to template questions and the responses are reset to the default values. This behavior is determined by the site configuration option parameter `Application.ACM.TemplateVersionUpgradeKeepPreviousAnswer`. (Site configuration options are set for you by SAP Ariba. For more information about this option, see Site Configuration Options for Contract Amendments [page 425].

Project Changes After a Template Upgrade

When SAP Ariba updates an amended project with template upgrades, it adds the following items if they have been added to the template:

- Folders and documents, including new assembled contract documents.
- Tasks.
- Project groups.

If the following objects have not been modified in a project, the SAP Ariba solution updates them with changes from the latest published template:

- Folders. SAP Ariba updates a folder if it was empty in the workspace and not modified.
- Tasks. SAP Ariba updates approval flows if the task has not been started. (The SAP Ariba solution does not update other task attributes.)

By default (`Application.ACM.FullTemplateVersionUpgrade` is set to `No`, the default value), SAP Ariba does not update the following objects if they already exist in a project:

- Project groups.
- Tasks that have been started.
- Ordinary documents (documents that are not assembled contract documents or Contract Terms documents).
- Assembled contract documents.
- Contract Terms documents.

If `Application.ACM.FullTemplateVersionUpgrade` is set to `Yes`, SAP Ariba propagates the following changes from the project template when applying a template upgrade:

- Changes to ordinary documents (documents that are not assembled contract documents or **Contract Terms** documents) if the document was not modified in the workspace.

  > Note
  >
  > If you have enabled `Application.ACM.TemplateUpgradeForContractWorkspacesWithAssembledDocuments` , the assembled contract documents are updated to the latest version from the template. For more information, see Contract workspaces that contain assembled documents [page 75]

- Members added to project groups.

By default, the parameter `Application.ACM.TemplateUpgradeForDocumentTask` is set to **No**. Therefore, document tasks in a contract workspace are not updated when its template is upgraded. To update the document tasks, set the parameter value to **Yes**.

Site configuration options are set for you by SAP Ariba. For more information about these options, see Site Configuration Options for Contract Amendments [page 425].

Contract Workspaces That Contain Assembled Documents

If you have enabled `Application.ACM.TemplateUpgradeForContractWorkspacesWithAssembledDocuments`, you can upgrade templates of contract workspaces that contain assembled documents such as a main agreement or a contract addendum. If the contract workspace for which you are upgrading the template contains a main agreement or a contract addendum, during the template upgrade you receive a warning stating that the assembled documents, including finalized documents, in the contract workspace will be replaced with the latest version from the template. Only if you confirm the upgrade, the contract workspace and the assembled documents are upgraded to the new version of the template.

> ⓘ Note
>
> Template upgrade is not supported for contract workspaces that contain assembled PDFs.

Template upgrade of contract workspaces that contain assembled documents such as a main agreement or a contract addendum is supported only as part of amendments of type **Amendment** or **Renewal**.

If an assembled document such as a main agreement or a contract addendum was overwritten during a template upgrade, you can download the previous version from the **View Details** > **Version history** page and upload that to replace the version created by the template upgrade.

Parent topic: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

Publishing Contract Workspaces [page 69]
Amendment of Contract Workspaces [page 70]
Amending a Published Contract Workspace [page 75]
Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]
Closing Contract Workspaces [page 78]
Amending a Published Contract Workspace [page 75]

Amending a Published Contract Workspace

Use this procedure to amend a published contract workspace.

Procedure

1. In the **Contract Attributes** area of the **Overview** tab, choose **Actions** > **Amend**.

2. Choose an amendment type.

> → Tip
>
> - If the contract expiration type is **Auto Renew** and you want to extend the contract after the last expiration date has passed, choose **Renewal**.
> - If you want to extend contracts that are in expired status, you can choose **Amendment** to update the expiration date and publish the contract immediately without having to first create an **Administrative** amendment.
> - If the workspace contains a line items document and you only want to edit existing line items (but not add or delete line items), you can select **Price Update** if the workspace has a task that is repeated for each new draft of the workspace and you do not want to start a new round of the task.

For more information about the standard fields in the contract that you can modify with a given amendment type, see Editable Fields with Different Amendment Types [page 72].
3. If the page includes an **Upgrade Template Version** field, specify if you want to update the project to use the latest version of the project template.
4. Add an **Amendment Reason**.

> ⓘ Note
>
> You can add or have your contract administrator add conditions to amendment reasons. See Project Template Guide for more information on using conditions.

5. Click **OK**.
6. Change the workspace or workspace documents as needed.
7. Navigate to the **Contract Attributes** area of the **Overview** tab and perform one of the following actions:
   - For **Amendment**, **Renewal**, or **Termination** amendments, choose **Actions** > **Publish** to publish the amended contract workspace. If the effective date is now in the future, the contract workspace status changes to **Pending**; otherwise, the status changes to **Published**.
   - For **Administrative** or **Price Update** amendments, choose **Actions** > **Complete Amendment**.

Task overview: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

Publishing Contract Workspaces [page 69]
Amendment of Contract Workspaces [page 70]
Application of New Project Template Versions with Contract Amendments [page 73]
Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]
Closing Contract Workspaces [page 78]
About Amending Contract Workspaces [page 70]

Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces

Use this procedure to put contract workspaces on hold and resuming work on contract workspaces.

Prerequisites

This topic is applicable only to SAP Ariba Contracts workspaces.

Context

SAP Ariba provides a feature to put contract workspaces on hold. Putting a contract workspace on hold enables you to suspend work on a project with the ability to resume work at a later date. Typically, only contract workspaces in **Draft** or **Draft Amendment** states are put on hold.

> ⚠ Limitations
>
> You cannot put closed contract workspaces on hold.
>
> If your SAP Ariba Contracts solution is integrated with SAP Ariba Procurement solutions that include the contract compliance feature, you cannot place a contract workspace on hold if the workspace has a corresponding compliance contract and there are pending approvals for the compliance contract.

When a contract workspace is on hold:

- Users cannot modify or add project attributes, documents, or tasks. However, if a review, approval, or negotiation task was in progress when the project was put on hold, reviewers or approvers can review or approve the document. The task owner cannot complete the task or start a new round.
- Users do not receive notification emails for overdue tasks or for tasks that are close to being due.
- Users do not receive expiration email notifications but do receive contract notice email notifications (notifications scheduled according to the contract notice period).
- Users receive emails from notification tasks. Notification tasks are scheduled regardless of the project status.

If you put a published contract workspace on hold and there is a corresponding compliance contract, the compliance contract is closed.

Procedure

1. In the **Contract Attributes** area of the **Overview** tab, choose **Actions** > **Put On Hold**.
2. To resume work on a contract that is on hold, navigate to the **Contract Attributes** area of the **Overview** tab and choose **Actions** > **Resume**.

   Resuming work on an unpublished contract workspace changes the workspace status to **Draft**.

Resuming work on a published contract workspace changes the workspace status to **Draft Amendment** and the status of any associated compliance contract changes to **Draft**.

> ⓘ Note
>
> If the contract workspace contains tasks that are configured to repeat for each document draft, they'll be reset accordingly.
>
> **What are tasks configured to repeat for each document draft?**
>
> - Tasks in the project template having the option **Repeat for Each Document Draft** enabled.
> - Tasks in the contract workspace whose predecessor is a task having the option **Repeat for Each Document Draft** enabled.

Task overview: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

Publishing Contract Workspaces [page 69]
Amendment of Contract Workspaces [page 70]
Application of New Project Template Versions with Contract Amendments [page 73]
Amending a Published Contract Workspace [page 75]
Closing Contract Workspaces [page 78]

Closing Contract Workspaces

Use this procedure to close contract workspaces.

Prerequisites

- The status of the contract workspace you want to close must be one among the following:
  - **Draft**
  - **Published**
  - **Expired**

  > ⓘ Note
  >
  > If you've integrated SAP Ariba Contracts with SAP Ariba Procurement solutions solutions and the contract workspace you want to close has a corresponding compliance contract with pending approvals, you will not be able to close the contract workspace.

- If you want email notifications to be generated for notification tasks in the closed contract workspace, enable the ICM parameter `Application.ACM.EnableNotificationForClosedContractWorkspace`. For information about the ICM parameter, see Intelligent Configuration Manager administration.

Context

In SAP Ariba Contracts, you can choose to manually close a contract workspace if necessary. However, if you want to work on a contract after you've closed it, you've the option to amend the contract.

Procedure

1. Open the contract workspace you want to close.
2. Go to the **Overview** > **Contract Attributes** section.
3. Select **Actions** > **Close**.

Results

The contract workspace is closed.

> **Note**
>
> After a contract workspace is closed,
>
> - Project attributes, documents, or tasks of the contract cannot be modified. New notification tasks can be created, if necessary.
> - If the ICM parameter `Application.ACM.EnableNotificationForClosedContractWorkspace` is not enabled, email notifications are not sent for notification tasks in the contract.
> - Email notifications related to contract notice or expiration are not sent.
> - Email notifications are not sent for tasks that are due or overdue.

Task overview: Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]

Related Information

Publishing Contract Workspaces [page 69]
Amendment of Contract Workspaces [page 70]
Application of New Project Template Versions with Contract Amendments [page 73]

Amending a Published Contract Workspace [page 75]
Putting Contract Workspaces On Hold and Resuming Work on Contract Workspaces [page 77]

Management of Non-Disclosure Agreement Contracts

You can create, send, and manage Non-Disclosure Agreement (NDA) contracts directly from the main dashboard.

Organizations can administer Non-Disclosure Agreement (NDA) contracts directly from the main dashboard. Organizations can quickly create standard, boilerplate-type NDA contracts, manage NDA templates, and send NDAs to recipients for their signature. Organizations can also preview NDA contracts from within the NDA dashboard.

The signature exchange mechanism is integrated with the electronic signature solutions provider DocuSign, so counterparties can quickly sign and return NDAs with their signature to buying organizations.

> ⓘ Note
>
> You must be a part of either the *NDA User* or the *NDA Admin User* group to be able to administer NDAs.

OAuth Authentication for NDA Contracts

NDA contracts can use the OAuth authentication method to send contracts to the DocuSign application for electronic signatures. The OAuth authentication method uses unique key tokens to access the DocuSign application. These unique key tokens are generated dynamically for each DocuSign user.

When users initiate a signature task (Submit, New Round, Withdraw, Edit, or Refresh) for a contract from the NDA workspace, users are prompted with the DocuSign sign in page followed by the user consent page. Every new user must grant access for OAuth in the user consent page. For more information, see Granting User Consent for OAuth from the NDA Workspace [page 84]. After the user grants access to OAuth authentication in the user consent page, they are redirected to the NDA workspace, where the user can resubmit an NDA contract for electronic signatures to DocuSign or revoke a contract from DocuSign. When a user resubmits a signature task after granting user consent to the OAuth authentication method, buyer will automatically be directed to the DocuSign application.

Prerequisites

- The Non-Disclosure Agreement Contract functionality requires your Designated Support Contact to log a service request to enable it. An SAP Ariba Customer Support representative will follow up to complete the request.
- You must be a member of the NDA User or the NDA Admin User group to be able to administer NDAs.
- Site configuration options are set for you by SAP Ariba. For more information about these options, see Site Configuration Options for Signature Tasks [page 444].

- For setting up OAuth authentication:
  - Have your Designated Support Contact (DSC) submit a Service Request (SR). An SAP Ariba Support representative will follow up to complete the request.
  - Enable DocuSign for electronic signatures in your site and also specify the administrator's DocuSign account ID in SAP Ariba Contracts. If you do not know the DocuSign account ID, check with DocuSign.

    > ⓘ Note
    >
    > Your organization must have a single administrator account with DocuSign. The account ID will be the ID for the administrator account with DocuSign. For more information, see the About Configuring DocuSign Electronic Signatures section in the Contract Administration Guide.

  - To send contracts from SAP Ariba Contracts to DocuSign for electronic signatures, you must have your site administrator grant access to the OAuth authentication in the SAP Ariba Administrator page. For more information, see Granting Admin-User Consent for OAuth in SAP Ariba Contracts in the Contract Administration Guide.

Restrictions

- You cannot send an NDA contract to DocuSign or revoke an NDA contract from DocuSign without the admin-user consent for OAuth. If you try to submit a signature task for an NDA contract without the admin-user consent for OAuth, the following error is displayed:

  ```
  Admin consent is required.
  ```

  The error is displayed for any type of signature task submitted without the admin-user consent; signature tasks such as Submit, New Round, Withdrawal, Update, and so on.
- Users cannot send a contract document for electronic signatures from SAP Ariba Contracts to DocuSign if they do not have a DocuSign user account. The **Automatically Create User** option is no longer available to automatically create a DocuSign user account when a user sends the contract document for electronic signatures to DocuSign.

  Workflow for Managing Non-Disclosure Agreement Contracts [page 82]

  Granting User Consent for OAuth from the NDA Workspace [page 84]

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Creation and Management of Knowledge Projects [page 85]

Workflow for Managing Non-Disclosure Agreement Contracts

As a buyer who is part of either the *NDA User* or *NDA Admin User* group, you can manage non-disclosure agreement contracts using the following workflow:

- On the main UI dashboard, navigate to **Manage** > **Non Disclosure Agreement**.
  - If you are a member of the *NDA User* group, you see a **Manage NDAs** page, from which you can select an NDA template or upload a document to be sent to recipient(s) for signature.
  - If you are a member of the *NDA Admin User* group, you see a **Manage NDA Templates** page, from which you can create NDA templates. Alternatively, you can select **Manage NDAs** to be redirected to the **Manage NDAs** page, from which you can select an NDA template or upload a document to be sent to recipient(s) for signature.

> Note
>
> If you choose to upload the NDA document, ensure that the size of the document is not more than 3 MB.

- The **Manage NDAs** page displays the NDAs in draft, pending, signed, expiring, expired, or declined status. The status indicates one of the following:
  - Draft: There was an issue with sending the document to DocuSign; you may retry sending the document to DocuSign
  - Pending: The document requires signature from one or more recipients
  - Signed: The document has been signed by all the recipients
  - Expiring: The document expires in the next 90 days
  - Expired: The document is past the expiration date
  - Declined: At least one user has declined to sign the document

  You can quickly search for NDAs of interest in the search bar by using filters such as title, recipient, effective date, expiration date, created date, signers, or owner.

> ⓘ Note
>
> - For NDA templates or workspaces **that were created before the 2023 Q2 SAP Ariba release**, the owner column always shows the name of the buyer user.
>   Example: If a buyer user and a third-party user have a profile with the same unique name, then the owner column refers to the buyer user's profile.
> - For new NDA templates or workspaces **that are created after the 2023 Q2 SAP Ariba release**, the owner column shows the name and refer to the profile of the user who has actually created the template or the workspace.

You can also download, delete, or preview an NDA within the application by selecting one of the actions in the **Action** column for a specified NDA. For NDAs in Pending status, an additional **Revoke** option appears as one of the actions in the **Action** column. This option voids the NDA in DocuSign. When you click **Revoke**, you must enter a mandatory reason for withdrawing the NDA, which DocuSign includes in the email that it sends to the recipients.

> ⓘ Note
>
> NDAs that are in **Draft** and **Pending** status are restricted to the owner and members of the *NDA Admin User* group.

> ⓘ Note
>
> If you use the OAuth authentication method for electronic signatures from DocuSign:
>
> - You cannot send an NDA contract to DocuSign or revoke an NDA contract from DocuSign without the admin-user consent for OAuth. For more information, see Granting Admin-User Consent for OAuth in SAP Ariba Contracts.
> - When you submit a signature task for an NDA contract or revoke an NDA contract for the first time, you will be prompted with the DocuSign sign in page and the user consent page. The user consent page is displayed only once for any signature task initiated for a contract from the NDA workspace for the first time.
> - If you have revoked a contract from DocuSign, and choose to send the same contract for electronic signatures at a different time, then you will be prompted with the DocuSign sign in page followed by the user consent page.

- To create a boilerplate NDA template, you must be part of the *NDA Admin User* group. Select **Create NDA Template**, and then drag-and-drop an NDA template document from your system and give your template a title and an optional legal entity name. Based on the information you provide for the template, the buying organization name, recipient organization name, effective date, expiration date, and today's date, are automatically populated for NDAs that will use the template in place of the following placeholder text.

> ⓘ Note
>
> The organization field is typeahead searchable and lists all the buyer's supplier organizations that match the text as you enter it. You can choose one from the dropdown or enter free-form text. Based on the supplier organization you select from the dropdown, you can also search for supplier users by using the name or email text box. Alternatively, you can also enter any free-form text in the name and email text boxes. The email textbox has validations to ensure that it is a valid email address format. The effective date, expiration date, and today's date use the standard format, dd mmm yyyy.

    - **${caDiscloser}**: the legal entity defined on the template (1st preference) Or Your Site Name as created in Ariba Site manager
    - **${caRecipient}**: the recipient name specified while creating the NDA
    - **${caEffectiveDate}**: the effective date specified while creating the NDA
    - ${**caExpirationDate}**: the expiration date specified while creating the NDA
    - **${caToday}**: today's date

  To publish the template, click **Publish**.
- To send an NDA to one or many recipients for signature, select **Create NDA** if you are a member of the *NDA User* group, and specify information such as the recipient details, the effective, and the expiration date. If you are a member of the *NDA Admin User* group (or of both the groups), select **Manage NDAs** to be redirected to the **Manage NDAs** page, and then select **Create NDA**.
  To filter the list of NDA templates, click the filter icon. From the list of NDA templates created by all the *NDA Admin User* users of your organization, you can click the Preview icon next to a template to preview the document or the Download icon to download a copy of the document. Click the Select icon next to a template to send the template to the recipient(s), give it a title, and select **Send For Signature**. This step sends the NDA template to DocuSign. You can also enter an optional comment in the provided text box, and select **Share comment with recipient**. This sends the comment in the email that DocuSign sends to recipients.

  > ⓘ Note
  >
  > To make changes to an NDA document, you can click the **Download** icon to download a template, make changes to it, and then upload it by clicking the **upload a new NDA** hyperlink.

  The recipient(s) receive an email from DocuSign with a request for their signature, and can electronically sign the NDA. DocuSign sends a copy of the NDA to all the recipients.

Parent topic: Management of Non-Disclosure Agreement Contracts [page 80]

Related Information

Granting User Consent for OAuth from the NDA Workspace [page 84]

Granting User Consent for OAuth from the NDA Workspace

Use this procedure to grant user consent for OAuth from the NDA workspace.

Prerequisites

- Your site must be enabled to use the OAuth authentication method.
- Your site administrator must have granted access for OAuth in the SAP Ariba Administrator page.

Context

Buyers can create signature tasks to send an NDA contract to DocuSign or to revoke an NDA contract from DocuSign. When a buyer initiates a signature task for the first time, with the OAuth authentication method enabled, an error is displayed. This topic assumes that the buyer is sending an NDA contract to DocuSign for electronic signatures by creating a signature task in the NDA workspace.

Procedure

1. In the **Manage NDAs** page, do one of the following:
   - Right-click an NDA contract from the **Draft** tab and click **Send for Signature**.
   - Create a new NDA contract and click **Send for Signature**.

   If the action is initiated by the buyer for the first time, then the following error is displayed:

   ```
   Unable to send <contract name> to DocuSign for Signature.
   User has not provided consent to DocuSign. You'll be redirected to
   DocuSign to get consent.
   ```
2. Click **OK**.

   Buyer will be redirected to the DocuSign log in page.
3. Enter the user name and click **Continue**.
4. Enter the password and click **LOG IN**.

   The DocuSign consent page for SAP Ariba is displayed.
5. Click **Accept**.

   Buyer will be redirected to the **Manage NDAs** page. Buyer can now resubmit the NDA contract for electronic signatures.

Task overview: Management of Non-Disclosure Agreement Contracts [page 80]

Related Information

Workflow for Managing Non-Disclosure Agreement Contracts [page 82]

Creation and Management of Knowledge Projects

Knowledge projects are projects designed to contain documents with general knowledge about your company and your company's processes that you want to access or reuse. When users work on a project, SAP Ariba can display links to documents from knowledge projects (knowledge documents). You can use knowledge project features to control which links are shown depending on project fields, task phases, and tasks.

Users do not need to be able to view or create knowledge projects to take advantage of the knowledge itself. Depending on your configuration, users see the document links in the **Related Knowledge** area to the left of the project's tabs or on a **Task Details** screen. For more information about viewing knowledge documents, see Viewing Knowledge Projects and Documents [page 89].

SAP Ariba displays links to documents from knowledge projects in a non-knowledge project when:

- The knowledge project and non-knowledge project match at the project level. A knowledge project includes the following fields used for project matching:
  - **Commodity**
  - **Regions**
  - **Departments**
    For more information, see Project Level Matching [page 87].
- If the projects match, SAP Ariba checks to see if a document in the knowledge project matches criteria specified in the project you are working on. The criteria can be:
  - Keyword matching for the current phase.
    Knowledge project documents publish keywords. Phases in non-knowledge projects can subscribe to keywords. If a keyword for the current phase in a non-knowledge project matches a keyword for a document in a knowledge project at the project level, SAP Ariba can display the document in the **Related Knowledge** area. For more information, see Matching Knowledge Documents to Phases Using Keywords [page 90].
  - A direct link from a task to a knowledge project document.
    You can create a direct link between a task and a knowledge document. If a non-knowledge project matches a knowledge project at the project level and a task in a non-knowledge project has a direct link to a document in a knowledge project, a link to that document shows on the **Task Details** screen (rather than in the **Related Knowledge** area).
    For more information, see Creating Direct Knowledge Links for Tasks [page 92].
- A knowledge document with the **All** keyword.
  The **All** keyword is a reserved keyword that matches all projects that match the knowledge project regardless of keyword subscriptions. The knowledge document is displayed for all phases and tasks in the matching project. The **All** keyword is selected in the knowledge document's **Publish Keyword** pull-down menu.

Users can also use the **Search Knowledge** link in the **Related Knowledge** area to find documents from knowledge projects.

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Management of Non-Disclosure Agreement Contracts [page 80]
Setting Access Controls on Projects and Documents [page 93]
Copying Projects [page 96]

[Moving Projects [page 99]](#)
Deleting Projects [page 100]
Project Linking [page 102]
Creating Hyperlinks to Projects and Documents [page 109]
Creating a Task for an Entire Project [page 111]
Viewing and Managing Project Announcements [page 112]
Creating Quick Surveys [page 113]
Viewing a Project's Activity History [page 116]
Exporting Tasks to Microsoft Outlook [page 118]
Integration of SAP Ariba Projects with Microsoft Project [page 120]

Prerequisites for Managing Knowledge Projects

To create or edit knowledge projects, you must be a member of one or more of the following system groups:

- **Event Administrator**
- **Commodity Manager**
- **Customer Administrator**
- **Ariba Sourcing Manager**
- **Procurement Manager**
- **Procurement Agent**
- **Contract Manager**
- **Contract Agent**

Related Information

Creating a Knowledge Project [page 90]
Matching Knowledge Documents to Phases Using Keywords [page 90]
Creating Direct Knowledge Links for Tasks [page 92]

Project Level Matching

For links to knowledge project content to appear in a project or task details, the projects must first match at the project level. If this requirement is met, SAP Ariba then checks to see if a document in the knowledge project matches criteria for keywords in the phase or a direct link in a task.

Project Matching for Fields with No Specified Value

If a field in a knowledge project has no value specified, it is evaluated as a wildcard for project level matching; it matches all non-knowledge projects with that field, regardless of the field value in the non-knowledge projects.

If a field in a non-knowledge project has no value specified, it only matches knowledge projects with no value specified or the value **All** for the same field.

For example, if you create a project with **Regions** set to `Asia` (with no other attributes specified) only knowledge projects with **Regions** set to no value, **All**, `Asia`, or a child of `Asia` regions are can display knowledge documents in the **Related Knowledge** area of a project.

If you create a project and specify no value in the project fields used for knowledge matching, only knowledge projects with no value or **All** for those fields match. For example, if you specified USA in the **Regions** field for your knowledge project, a project created without a region selected does not display knowledge from that knowledge project.

Project Matching Examples

The following table lists several examples of when a non-knowledge project and a knowledge project match:

If the Commodity of the Knowledge Project Is...	And the Region of the Knowledge Project Is...	And You Create a New Project With...	Is the Knowledge in the Knowledge Project Available for Use in Project?
IT	APAC	Commodity = IT Region = no value	no
IT	no value	Commodity = All	yes
IT	APAC	Commodity = IT Region = APAC	yes
no value	APAC	Region = China (hierarchical child of APAC)	yes
no value	APAC and EMEA	Region =APAC	no
no value	APAC and EMEA	Region = APAC, EMEA	yes
IT	no value	Region = APAC, EMEA	no
no value	no value	Region = APAC, EMEA	yes
no value	no value	no value	yes
no value	APAC	Region = APAC, EMEA	no
no value	All	Region = APAC, EMEA	yes
no value	Japan and France	Region = APAC, EMEA	yes
no value	APAC and EMEA	Region = Japan, France	yes

Viewing Knowledge Projects and Documents

Use this procedure to view knowledge projects and documents.

Context

Knowledge projects are projects designed to contain documents (knowledge documents) with general knowledge about your company and your company's processes. This topic describes how to view knowledge projects and documents from other projects, such as SAP Ariba Sourcing and SAP Ariba Contracts projects.

For information about creating knowledge projects and linking them to other projects or to tasks, see Creating a Knowledge Project [page 90].

Procedure

1. Navigate to the **Related Knowledge** area in the upper-left side of a project.
2. Click one the following options:
   - **Expand Projects**. Select this option to display the knowledge projects and documents related to your project.
     SAP Ariba displays a maximum of four projects and six published documents in the **Related Knowledge** area, although there is no limit to the number of documents or projects you can set up as related knowledge. If there are additional related knowledge items, you can click the **More** link to display a menu with additional related knowledge items.
   - **All Knowledge Areas**. Select this option to display preconfigured knowledge documents for your solution, such as prepackaged reports or the **Clause Library** (SAP Ariba Contracts), **Sourcing Library** (SAP Ariba Sourcing), or the **Supplier Knowledge** area (SAP Ariba Supplier Management).
   - **Search Knowledge**. Select this option to search for knowledge projects and documents.

Results

The knowledge projects are sorted so that the most relevant items are displayed at the at the top of the **Related Knowledge** area. For example, if the region for your project is China, knowledge specific to China appears at the top, followed by knowledge for APAC (the parent region for China), and then generic knowledge.

Creating a Knowledge Project

Use this procedure to create knowledge projects to store documents that contain information that you want users to access when working on projects.

Prerequisites

You must be a member of a group listed in Prerequisites for Managing Knowledge Projects [page 87].

Procedure

1. On the SAP Ariba dashboard, click **Create** > **Knowledge Project**. SAP Ariba opens a **Create Knowledge Project** page.
2. Enter information for the type of knowledge you are archiving.

   Select values for **Commodity**, **Regions**, and **Departments** for project level matching. For information on how field values are matched, see Project Level Matching [page 87].
3. Click **Create**.

Related Information

About Creating and Managing Knowledge Projects [page 85]

Matching Knowledge Documents to Phases Using Keywords

Use this procedure to match knowledge documents to phases using keywords. Links to knowledge documents that match a phase appear in the **Related Knowledge** area of a project when the phase is active.

Prerequisites

You must be a member of a group listed in Prerequisites for Managing Knowledge Projects [page 87].

Context

You use keywords to match knowledge documents (documents in knowledge projects) to phases containing tasks, but not to individual tasks.

Matching knowledge documents to a phase using keywords is a subscribe–publish relationship.

- Knowledge documents publish keywords.
- Phases in projects subscribe to keywords.

When a phase is active in a project, users will see a document from a knowledge project in the Related Knowledge area if:

- The project and the knowledge project match at the project level.
- The document in the knowledge project publishes a keyword.
- The phase in the project subscribes to the same keyword published by the knowledge document.

A knowledge document can publish the keyword **All** . In this case, the documents appears in the Related Knowledge for all phases of all projects that match the knowledge project at the project level.

Documents in knowledge projects with no published keywords never appear in the **Related Knowledge** area. You can locate them using a search operation or by clicking **Search Knowledge** in the **Related Knowledge** area.

> ⚠ Limitations
>
> You can only subscribe to keywords in phases in a project template. You cannot create ad-hoc subscriptions to keywords in individual project phases.

Procedure

1. On the SAP Ariba dashboard search bar, click the content type menu to the left of the search field and select a project type.
2. Click **Knowledge Areas** in the upper right hand area of the screen.
3. Navigate to a knowledge project.
4. Navigate to the document in the knowledge project you want to match to the project phase.
5. Click the document name and choose **Edit Attributes**.
6. In the **Publish Keywords** field, click choose the keyword you want to associate with this document. The administrator defines which keywords are available.

   Selecting **All** causes SAP Ariba to match the document in all non-knowledge projects that match the knowledge project whether or not the non-knowledge project contains any phases or contains phases that subscribe to any keywords, matching or not.
7. Click **Publish**.
8. Navigate to the template used to create the project containing the phase you want to associate with the knowledge document.
9. Make sure the template is in **Draft** mode, so you can perform edits.
10. **Edit** the phase.

11. On the **Edit Phase** screen, click **select** in the **Subscribe For** field and select the keyword you chose for the knowledge document above.

Related Information

About Creating and Managing Knowledge Projects [page 85]

Creating Direct Knowledge Links for Tasks

Use this procedure to create direct knowledge links for tasks. You use direct knowledge links to match knowledge documents (documents in knowledge projects) to individual tasks. Links to the knowledge documents appear in the **Task Details** page.

Prerequisites

You must be a member of a group listed in Prerequisites for Managing Knowledge Projects [page 87].

Context

A direct knowledge link between a task and a knowledge document is a link to a knowledge document that appears on the **Task Details** page, rather than in the **Related Knowledge** area. You create direct links to tasks in project templates.

Users will see will see a link to a knowledge document on a **Task Details** page when both of the following conditions are met:

- The knowledge project containing the knowledge document matches the project containing the task as described in Project Level Matching [page 87].
- There is a direct knowledge link from the knowledge document to the task.

If a task is contained in a phase, keyword matching is not required for the phase; direct knowledge links work regardless of keywords published for the knowledge document.

Procedure

1. Open the knowledge project containing the document you want to link to a task.
2. Navigate to the document to be linked.
3. Click document name and choose **View Details**.

4. On the **Overview** tab, choose ▶ **Actions** ▶ **Edit Attributes** ◀.

   You must have the proper group access to edit the document.
5. Navigate to the **Describes Tasks** field and click **select**.

   A **Select Task** page opens with a list of all project template folders and templates.
6. Click the expand arrows to open the folders and templates and view the tasks. Click **Add** to add a direct link between the task and the knowledge document.
7. Click **OK**, then click **Save**.

Related Information

About Creating and Managing Knowledge Projects [page 85]

Setting Access Controls on Projects and Documents

Use this procedure to set access controls to specify which team members can view a project or document.

Prerequisites

To set access control on a project, the following requirements must be met:

- The **Lock Access Control** filed is set to **No** in the template from which this project is created.

  > ⓘ Note
  >
  > This requirement is only for classic sourcing projects, guided sourcing projects, and contracts projects.
- You have project owner capabilities for the project.
  A user can get project owner capabilities for a project by being a member of the project's **Project Owner** group or by being a member of a global group that grants project owner capabilities and a member of any group in the project. For more information about the **Project Owner** group and project owner capabilities, refer to Project Owner Group and Capabilities [page 125] and Management of Project Teams [page 124].

If you set an access control for a project, all documents in the project inherit that access control; if you set an access control for a document, all tasks for the document are also protected by that access control.

Users meet access control requirements according to their membership in project teams or global user groups.

Some access controls restrict access; other access controls open access to members of a specified global user group. For example, setting **Private to Team Members** access control on a project restricts access to members of the project team, but setting **Classified** access control on a project allows all users who are members of the **Classified Access** global group to access the project, regardless of any other access controls.

Access to all projects and documents is restricted to users of the SAP Ariba solution used to create the project (or project that contains the document). In addition, access to SAP Ariba Contracts workspaces and documents is restricted by workspace type. For example, a user who is a member of the **Contract Manager** group can access procurement contract workspaces but not internal contract workspaces.

If you do not set any access controls on a project, all users of the solution used to create the project can access it (with the additional restrictions for contract workspace types).

For information about the access capabilities for global groups, refer to Strategic Sourcing and Supplier Management Group Descriptions.

> → Tip
>
> In most cases, you will want to set the access control **Private to Team Members** on a project. This restricts access to the project or document so that only project team members can view the project or document.

Subprojects can inherit team members from the parent project; these members can then access the subproject. For more information on setting access controls and controlling inheritance of team members in subprojects, refer to Team Inheritance in Subprojects [page 132].

Procedure

1. Perform one of the following actions:
    - To set access controls for a project, on the **Overview** area of the project's **Overview** tab, choose **Actions** > **Edit Overview**.
    - To set access controls for a document, on the project's **Documents** tab, click the document title and choose **Edit Attribute**s.
2. From the **Access Control** pull-down menu, choose **Select More**.
3. Select the access controls you want to apply to the project or document.

Access Control	Description

Classified	Only members of the following groups can access the classified project or document:
	• Classified Access global group
	• Other groups with classified access, such as:
	    ◦ Contract Manager
	    ◦ Internal Contract Manager
	    ◦ Sales Contract Manager
	    ◦ Sourcing Manager
	    ◦ Supplier or Customer Manager
	• Internal Users group (members need not have any roles assigned)
	
	Members of the Classified Access global group and other groups with classified access can access the project or document. For sourcing projects, members of the Classified Access and Sourcing Manager global user groups can access the project.

Access Control	Description
Draft Access Restricted	A user who has access to the project or document but who is not a document owner or project owner can access only the last published version of the document. A user who is not a document or project owner will get the following error when attempting to open a document that has not been published or attempting to open a draft version of a document: **You do not have permission to view an unpublished version of the document.** Draft Access Restricted affects only to documents with file contents (such as text files), SAP Ariba Contracts assembled contract documents, and form documents, excluding savings forms. Draft Access Restricted has no effect on savings forms, SAP Ariba Sourcing events, analytic report documents, or other documents without file content.
Owner/Administrator Only	Only members of the Project Owner project group and users with project owner capabilities can view the project or document.
Private to Internal Users	Only members of the Internal global user group (typically users in your company, rather than external supplier or customer organization users) can view the project or document.
Private to Team Members	Only project team members can view the project or document.
Legal Information	Members of the Legal group can view the project or document.
Finance Information	Members of the Finance group can view the project or document.
Private to Solution Users	Only the users of the specified SAP Ariba solution can view the project or document. The Private to Sourcing Users and Private to Sourcing Pro Users access controls grant project or document access to all SAP Ariba Sourcing users, including external supplier users. If you do not want to grant project or document access to external suppliers, use Private to Internal Users in addition to the Private to Sourcing Users and Private to Sourcing Pro Users.

4. Click **Done**.
5. (Optional) To see the project team members who have access to the project or document with the current settings, click **View Details**.
6. Click **Save**.

Task overview: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Management of Non-Disclosure Agreement Contracts [page 80]
Creation and Management of Knowledge Projects [page 85]

Copying Projects

Use this procedure to copy a project. When you copy a project, SAP Ariba creates a copy of the current project that retains most of the original project's attributes. You cannot specify a project type or template when copying a project; the copy of the project uses the original project's type and the latest published version of the template used to create the original project.

Prerequisites

You can copy a project if:

- You can access the original project
- You have project owner capabilities for the original project
- You can create project of the same type as the original project
- You can use the template used to create the original project

Context

> ⚠ Limitations
>
> You cannot copy SAP Ariba Supplier Management workspaces. **Supplier Management** workspaces are unique to individual suppliers.

When you create a copy of a project:

- You must provide a new name for the copy of the project. The projects are independent and there are no links between the projects. The status of and access to each project is independent of the other project. If you want to create a project with a link to another project, see Project Linking [page 102].

- The copied project does not inherit any ad hoc tasks (tasks added to the original project after the original project was created). You can select if you want the copy of the project to inherit any ad hoc documents or project team changes from the original project.
- The copied project does not include any empty document folders from the original project. Only document folders containing documents are copied.
- The copied project does not include any document shortcuts from the original project.
- When you copy a procurement workspace, any documents associated with it, such as requisitions, purchase orders, and so forth, are not copied with it.

There are two methods you can use to copy a project:

- Start from the page to create a new project.
- Start from the project page of the existing project that you want to copy.

Procedure

1. Choose if you will start from the page to create a new project or if you will start from the existing project that you will copy.
2. If you are starting from the page to create a new project:
    a. Navigate to the **Copy from Project** field (for SAP Ariba Sourcing and Supplier Performance Management projects) or the **Copy from Contract** field (for SAP Ariba Contracts projects).
    b. Choose a project name from the pull-down menu or choose **Other** to open a search window.

       If you are using the search window to select a project, specify any search criteria and click **Search**. SAP Ariba displays a list of projects that meet the search criteria.

       If a project in the search results does not meet the criteria for copying, the **Select** button will be grayed out. If you had highlighted a project name in the **Copy from Project** field (or the **Copy from Contract**) field before choosing **Other**, the search results will not included the highlighted project.

       Click **Select** in the row for the project you want to copy.
3. If you are starting from an existing project and want to create a copy of the project:
    a. Navigate to the **Overview** area of the project.
    b. Choose **Actions** > **Create** > **Copy Project**.

       SAP Ariba opens a create project page for the new project.
    c. Specify a name for the new project.
4. Specify or modify values for project attributes. You must specify if the project is a test project or not.
5. The template for the new project will be the template used to create the original project. Answer any template questions.
6. Answer the following questions:

    - **Do you want to copy documents that were modified in the project being copied?**
      If you choose **yes**, SAP Ariba creates the new project with all the documents currently in the original project, including ad hoc documents (documents not inherited from the template). If the original project contains documents inherited from the template and these documents have been modified, the new project contains the modified versions of these documents.
      If you choose **no**, SAP Ariba creates the new project with only the original documents as inherited from the template.

- **Do you want to copy project groups that were not in the template, from the project being copied?**
  If you choose **yes**, SAP Ariba creates the new project with all the project groups currently in the original project, including groups not inherited from the template and including users added to group inherited from the template.
  If you choose **no**, SAP Ariba creates the new project with only the original project groups and group members as inherited from the template.
- **Do you want to copy project phases/tasks that were not in the template, from the project being copied?**
  If you choose **yes**, SAP Ariba copies task configurations performed on top of the template, from the source project onto the project that is created. If the buyer creates any tasks or phases in the template phase in the source project, those tasks or phases are cloned under the corresponding templates in the destination project. Recursive phases or tasks that are part of the source project phases are also copied over to the destination project.
  You can copy tasks or phases only if you first select to copy documents and project groups.

7. Click **Create** to finish creating the new project.

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Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
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Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
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Exporting Tasks to Microsoft Outlook [page 118]
Integration of SAP Ariba Projects with Microsoft Project [page 120]

Moving Projects

Use this procedure to move projects. SAP Ariba organizes projects into folders according to project type. For efficiency when loading and searching projects, SAP Ariba also creates folder hierarchies within project type folders according to the date created and creates additional subfolders as needed for efficiency.

Procedure

1. Navigate to the **Overview** area.
2. Choose **Actions** > **Move**.
3. SAP Ariba displays the project folder structure for your organization. Click the radio button the folder where you want to move the project.
4. Click **OK**.

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Deleting Projects

Use this procedure to delete a project.

Prerequisites

The value of the site configuration parameter `Application.ACM.ProjectDeleteLimited` controls whether a project must meet certain requirements to be deleted.

If this parameter's value is `true` (the default value), all the following must be true to delete a project:

- You're the project owner or a user with project owner capabilities for the project.
- The project doesn't contain any in-progress tasks.
- Depending on the project's type, it must also meet one of the following requirements:
  - An SAP Ariba Sourcing project can't contain any events or surveys that are running or pending an update.
  - An SAP Ariba Contracts project can't have been published or amended.
  - A Supplier Performance Management project can't contain any surveys that are running or pending an update.

If this parameter's value is `false`, project owners can delete projects regardless of the status of any tasks, events, or surveys (or contract status, if it is an SAP Ariba Contracts project). For more information, see Site Configuration Options for Deleting Projects [page 428].

Context

Some common reasons to delete a project include the following situations:

- You created a project that contains an error, or created the project itself by mistake.
- You created test projects during the initial setup and testing of your SAP Ariba solution and want to delete those projects before rolling the solution out to other users in your organization.

Deleting a project is a permanent action and can't be undone. SAP Ariba recommends that you only delete projects that were created in error or as part of testing.

Although you can't restore a deleted project, SAP Ariba retains information about the project for auditing purposes. Deleting a project doesn't remove the project from the database; instead, it deactivates the project object so that the project is no longer visible and removes it from reports. Members of the **Deleted Documents Access** group can search for and view deleted projects.

Procedure

1. Navigate to the **Overview** tab.

2. In the Overview area, click **Actions** and choose **Delete Project.**

Results

Deleting a project causes the following changes for the project and its contents.

- Project
  The project is no longer visible. Data from the projects is no longer included in reports. The components are changed as follows:
  - **Tasks and phases**: Set to inactive.
  - **Template Answers**: Deleted from the database.
  - **Team**: Deleted from the database except for the **Project Owner** group, which is set to inactive. Since tasks aren't deleted and contract workspaces must have an owner, all tasks owned by a project group are reassigned to the **Project Owner** group.
- Content:
  - **Folders**: Set to inactive.
  - **Main Agreements and Contract Addendum**: Set to inactive.
  - **Subprojects**: Set to inactive and handled the same way as the project.
  - **All other documents**: Deleted from the database.

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Project Linking

You can link projects together by creating:

- Subprojects.
  A subproject is a project that you need to work on as a part of another project. For example, if you have a large contract with several different parts, such as leasing and furnishing office space, you can set up subprojects for contracts for leasing the building, purchasing office furniture, and setting up services.
  A subproject and its parent project do not have to be the same project type. Subprojects can inherit **Project Owner** group members and other project group members from their parent projects. SAP Ariba provides links between subprojects and parent projects so you can easily open a subproject from its parent project and vice-versa.
  You cannot make a project a subproject after it is created.
- Follow-on and predecessor projects.
  A follow-on project is a project you typically create after you are done with the original project but find that you need to create another, related project. A follow-on project and its predecessor project do not have to be the same project type.
  You can make a project a follow-on project after it is created.
  You can also create a sourcing follow-on project from a procurement contract workspace that contains a line items document. You can use a sourcing follow-on project to create a sourcing event that contains items from the line items document.
  In guided sourcing, full and single-event (quick) projects linked using follow-on and predecessor links are referred to as multi-stage projects.
- Hierarchical relationships between SAP Ariba Contracts workspaces as master agreements and subagreements.
  Master agreements and subagreements are more tightly coupled than other linked projects and must have the same contract workspace type.

Creating Subprojects [page 103]

Creating Follow-On Projects [page 104]

Creating Sourcing Follow-On Projects [page 105]

Creating Master Agreements and Subagreements [page 107]

Parent topic: Project Management [page 49]

Related Information

How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
Management of Non-Disclosure Agreement Contracts [page 80]
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Creating Subprojects

Use this procedure to create subprojects.

Context

Creating subprojects is one way to link projects together. For information about other methods you can use to link projects together, see About Linking Projects Together [page 102].

When you create a subproject, the subproject appears as a document on the parent project's **Documents** tab and SAP Ariba stores the subproject in the parent project's folder hierarchy. In addition, the parent project appears on the subproject's **Overview** tab.

Subprojects do not have to be the same project type as the parent project. When you create a subproject, SAP Ariba prepopulates fields that are common to the parent project type and the subproject type with values from the parent project.

You cannot turn a project into a subproject after you create it; you must establish the relationship with the parent project by creating the subproject directly from it.

Subprojects can also inherit team members from the parent project. If the parent project is restricted to private to team members, the team members you add individually to subprojects who are not members of the parent project team cannot access the parent project. If you need subproject team members to be able to access the parent project, add them to the parent project team. For more information on setting access controls and controlling inheritance of team members in subprojects, see Team Inheritance in Subprojects [page 132].

By default, subprojects do not appear in the **Recently Viewed** area of the dashboard. However, if you designate them as watched projects, they do appear in the **Watched Projects** dashboard content item.

After you close a parent project, its subprojects remain open until you close them individually.

Procedure

1. On the parent project's **Documents** tab, choose **Actions** › **Create** › **Subproject**.
2. Select the type of subproject to create.
3. Follow the steps for creating that type of project.

Task overview: Project Linking [page 102]

Related Information

Creating Follow-On Projects [page 104]
Creating Sourcing Follow-On Projects [page 105]
Creating Master Agreements and Subagreements [page 107]

Creating Follow-On Projects

Use this procedure to create follow-on projects.

Context

Creating follow-on projects is one way to link projects together. If you have a procurement contract workspace with a line items document, you can also create a sourcing follow-on project and add items from the line items document to the follow-on project or event, as described in Creating Sourcing Follow-On Projects [page 105].

For information about other methods you can use to link projects together, see About Linking Projects Together [page 102].

Follow-on projects do not have to be the same project type as the original (predecessor) project. When you create a follow-on project, SAP Ariba prepopulates fields that are common to the predecessor project type and the follow-on project type with values from the original project.

If you create a follow-on project, the **Overview** tab in the full view of the follow-on and predecessor projects displays a **Process** area with a link to the related project.

> ⚠ Limitations
>
> For SAP Ariba Contracts projects, the **Expiration Date** field is copied from the predecessor project to the follow-on project even if the Term Type for the follow-on project is Perpetual. If this occurs, the follow-on (perpetual) project will not expire but any notifications based on the expiration date will be sent.

Procedure

1. To create a follow-on relationship with an existing project, open an existing project that you want to use as a follow-on project. Navigate to **Overview** tab. In the Overview area, choose **Actions** > **Edit Overview**. In the edit project page, use the **Predecessor Project** pull-down menu to specify the predecessor project.
2. Alternatively, you can complete the following procedure to create a new project as a follow-on project:
   a. Open an existing project that you want to use as the predecessor project. Navigate to **Overview** tab. In the Overview area, choose **Actions** > **Create** > **Follow-on Project**.
   b. Select the type of follow-on project to create.
   c. Select or modify project fields.
   d. If you want to copy all documents from the predecessor project to the follow-on project, select **Yes** for the **Copy all documents from the parent projects?** prompt.
   e. If you want to copy all project groups from the predecessor project to the follow-on project, select **Yes** for the **Copy all project groups from the parent projects?** prompt.
   f. If the predecessor project has a line items document and follow-on project is a procurement contract workspace, you can select **Yes** for the **Select line items from contract content document?** prompt. A line items document will be created in the follow-on project and you can select the items you want to copy from the original line items document.
   g. Select a project template for the follow-on project and click **Create**.
3. If you selected **Yes** for the **Select line items from contract content document?** prompt in the previous step, the **Select Line Items To Copy** page opens. Select items from the line items document contained in the original (predecessor) project to add to the document in the new project.
   a. **Optional:** If the line items document contains item master data from multiple external systems, click the **External System** column label at the top of the table area to sort or filter the contents by the external system from which the item data was loaded.
   b. Click the check boxes for the items you want to add.
   c. Click **Copy**.

Task overview: Project Linking [page 102]

Related Information

Creating Subprojects [page 103]
Creating Sourcing Follow-On Projects [page 105]
Creating Master Agreements and Subagreements [page 107]
Creating Sourcing Follow-On Projects [page 105]
Project Linking [page 102]

Creating Sourcing Follow-On Projects

Use this procedure to create sourcing follow-on projects. Users can create sourcing follow-on projects (SAP Ariba Sourcing projects or requests from SAP Ariba Contracts procurement contract workspaces. If the workspace contains a contract line items document, the items can be copied or made available for copying in the follow-on project or request. Alternatively, if the workspace was created from a sourcing award, you can choose to have items from the original (predecessor) sourcing event copied to the follow-on project or request.

Prerequisites

- The workspace from which you want to create a sourcing follow-on project must be a procurement contract workspace.
- If you want to create a sourcing project, you must be a member of group with the ability to create a sourcing project (**Commodity Manager**, **Junior Sourcing Agent**, **Sourcing Agent**, **Sourcing Approver**, or **Customer Administrator**). Most users who cannot create sourcing projects can create sourcing requests.

Procedure

1. Navigate to the **Overview** area of a procurement contract workspace.
2. Click **Actions** > **Create** > **Sourcing Follow-on Project**.
3. If you are a member of a group that can create a sourcing project, you are prompted to select the type of follow-on item (**Sourcing Project** or **Sourcing Request**) to create. Click on the type of item you want to create.
4. If you are creating a follow-on sourcing project and the contract workspace was created from a sourcing event, click a selection button to specify if you want the follow-on project to contain items from the predecessor sourcing event or from the line items document. Click **OK**.

   The **Create Sourcing Request** or **Create Sourcing Project** page opens.
5. Specify or modify any attributes for the souring request or project. If you are creating a sourcing project, choose if you want to create a full sourcing project or a quick project (event). Click **Create**.

   Note that your response to the prompt **Copy all documents from the parent project?** or **Do you want to copy documents that were modified in the project being copied?** determines if documents other than the line items document are copied; it does not determine if the line items document is copied.

Results

- If you created a full project and chose to copy items from the contract line items document, the contract line items are not visible, but will be available for copying if you create an event in the sourcing project.
- If you created a full project and chose to copy items from the predecessor sourcing project, SAP Ariba creates a full project that contains an event with the same event type and contents as the event from which the contract was created.
- If you create an event (**Quick Project**), SAP Ariba copies the contents of the line items document or the predecessor project to the new event.
- If you created a sourcing request, it contains a **Sourcing Request Items** document with contents from the line items document. Do not delete this document; it can be used as a data source in events created from the sourcing request.

Next Steps

If you created a sourcing request or full sourcing project with items copied from the line items document, users can create an event from the request or in the full sourcing project, then add items from the line items document to the event by editing the contents of the event and clicking **Add** > **Content From Contract Workspace**.

Task overview: Project Linking [page 102]

Related Information

Creating Subprojects [page 103]
Creating Follow-On Projects [page 104]
Creating Master Agreements and Subagreements [page 107]
Creating Follow-On Projects [page 104]

Creating Master Agreements and Subagreements

Use this procedure to create master agreements and subagreements. You can use master agreements and subagreements to create hierarchical relationships between SAP Ariba Contracts workspaces that have the same type.

Context

Creating subagreements is one way to link contract workspaces (projects) together. For information about other methods you can use to link projects together, see About Linking Projects Together [page 102].

The **Hierarchical Type** field allows you to create hierarchical relationships between contract workspaces using master and subagreements. You can create these hierarchical relationships in addition to parent/subproject relationships.

You must create a master agreement before you can associate a subagreement with it. Master agreements and their subagreements must be of the same contract workspace type (sales contract workspace or procurement contract workspace). When you perform project search results, you can display results for contract workspaces in tree view, which shows the relationship between master and subagreements.

If you create a subagreement directly from a master agreement, the subagreement inherits the following project field values from the master agreement:

- **Supplier** (for procurement contract workspaces) or **Customer** (for sales contract workspaces)
- **Regions**
- **Commodity**

If you create a contract workspace and later associate it as a subagreement to a master agreement, it does not inherit supplier or customer, region, or commodity field values from the master agreement.

You can change a contract workspace's hierarchical type at any time by editing its attributes. If you must work on both a master and subagreement simultaneously before you publish the master agreement (or a supplier or customer is decided upon), you can create the subagreement as a standalone agreement, and then change its hierarchical type after you publish the master agreement and associate it with the master agreement. Alternatively, you can work on and publish the subagreement by setting the master agreement to Pending status.

When a master agreement expires or you close it, the subagreements under it do not automatically expire or close. Instead, they expire on their individual expiration dates, or you must close them.

When you modify the expiration date of the master agreement, the user interface displays a set of the subagreement contract workspaces. You can select the checkboxes next to the subagreements to which you want the new expiration date to be automatically propagated. Note that you can propagate changes to only subagreements that are in Draft or Draft Amendment status.

When you add subagreements to a master agreement, the sum of the contract amounts of the subagreements must not exceed the contract amount of the master agreement. To avoid this, SAP Ariba Support can configure your site to display a custom field that shows the contract amount remaining in the master agreement. The custom field can be displayed when a user is adding a subagreement to the master agreement. Contact SAP Ariba Support to enable the `Application.ACM.ComputeSubAgreementTotalAmt` parameter and create the custom field.

Limitations:

- A master agreement and its subagreements must be of the same contract workspace type (sales contract workspace or procurement contract workspace).
- When you create a subagreement from a master agreement or link a subagreement to a master agreement, the master agreement cannot be expired.
- You must specify the expiration date for a subagreement to be after the expiration date for the master agreement
- If site is integrated with SAP Ariba Procurement solutions that include the **contract compliance** feature and you want to associate a subagreement with a procurement contract workspace, the master agreement must be published so that it is identical in both **Contract Compliance** and SAP Ariba Contracts before you associate the subagreement with it. This restriction does not apply to sales contract workspaces.
- If either a sales or procurement contract workspace includes a **Contract Terms** document, you must specify a valid supplier or customer and publish the master agreement before you create a subagreement for it.
- If the subagreement has a contract terms document, the associated master agreement must also have a **Contract Terms** document.

Procedure

1. Choose if you will create or edit a project that will become the subagreement or if you will start from an existing agreement that will become the master agreement.
2. If you want to create or edit a project that will become a subagreement:
    a. Navigate to the **Create Contract Workspace** or **Edit Contract Attributes** page and choose **Sub Agreement** from the **Hierarchical Type** pull-down menu.
    b. Select the master agreement from the **Parent Agreement** pull-down menu.

       The parent agreement cannot be an expired agreement.

> ⓘ Note
>
> For perpetual agreements, the expiry date does not apply, as these agreements do not have an expiration. For more information see Contract Project Creation [page 15].

   c. If you are creating a new workspace, complete the steps for creating a contract workspace described in Contract Project Creation [page 15].
3. If you want to modify a workspace and make it a master agreement:
   a. Navigate to the **Create Contract Workspace** or the **Edit Contract Attributes** page of an existing workspace and choose **Master Agreement** from the **Hierarchical Type** pull-down menu. The master agreement cannot be expired.
   b. In the **Contract Attributes** area of the **Overview** tab, choose **Actions** > **Create Sub Agreement**. In some cases, the master agreement must be published before you can create a subagreement from it.

Task overview: Project Linking [page 102]

Related Information

Creating Subprojects [page 103]
Creating Follow-On Projects [page 104]
Creating Sourcing Follow-On Projects [page 105]
Term Type

Creating Hyperlinks to Projects and Documents

Use this procedure to create hyperlinks to projects and documents.

Context

You can create hyperlink URLs (also called webjumpers) to specific documents and projects to use to in email, project management systems, and other collaborative tools outside of SAP Ariba.

When a user clicks a link to a document or project, SAP Ariba verifies that the user is signed in and has access to the linked areas. Users who are not signed in must sign in before the linked document or project displays.

Procedure

1. Determine the SAP Ariba ID for the document project.

- For projects, go to the **Overview** area below the **Overview** tab. Locate the **ID** field. For example, **ID: WS2820**.
- For documents, open the detail view for the document by clicking the document name and choosing **View Details**. In the summary of the document properties to the left of its detail view, locate the **ID** field. For example, **ID: Doc4210**.

2. Create the hyperlink URL using the following format:

   `https://` *`mySapAriba`* `.com/ad/viewDocument?ID=` `ID`

   Where:

   `mySapAriba.com` is the domain you see in your browser's address bar when you are signed into SAP Ariba, and replace `ID` with the ID of the project or document. For example:

   `https://mycompany.sourcing.ariba.com/ad/viewDocument?ID=CW3092`

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Related Information

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Creating a Task for an Entire Project

Use this procedure to create a task, such as a review task, for an entire project.

Context

If you create a task for an entire project, a link to the project is sent to the task recipients. You can configure your project task with the document version tracking feature to have a new round of a task automatically created when a new version of the project is created.

For additional information multiple task rounds, see Multiple Task Rounds and Document Version Tracking [page 310].

Procedure

1. Navigate to the project **Overview** area.
2. Choose **Actions** > **View Details**.
3. Navigate to the **Properties** area of the **Overview** tab.
4. Choose **Actions** > **Create New Task** and choose the type of task you want to create, such as **Review**.
5. Specify information to create the task. See About Tasks [page 300] for more information about creating tasks.

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How Can I Manage Projects? [page 49]
Project Accessing and Viewing [page 54]
Project Field Edits [page 62]
Contract Workspace Lifecycle Management (Publishing, Amending, Holding, and Closing Contract Workspaces) [page 68]
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Viewing and Managing Project Announcements

Use this procedure to view and manage project announcements. You use project announcements to communicate general information to the project team.

Prerequisites

Any project team member can add an announcement to a project, but to delete an announcement, you must be the user who created the announcement or a user with project owner capabilities.

Context

Project announcements are accessible from the **Announcements** area of a project, the project message board, and the **Announcements** content item of the dashboard.

Procedure

1. Use one of the following methods to access and manage project announcements:
   - Open the **Announcements** area of a project. Click **New** to create a new announcement.
   - Open the message board of a project. In the **Labels** area, click **Announcement**. For information about adding an announcement using the message board, see About Using Project Message Boards.
   - Navigate to the **Announcements** content item of the dashboard, which contains announcements for watched projects. See Add or Removing a Project from the Watched Project Portlet [page 60] for details.
2. To delete an announcement, click the selection box for the announcement and click **Delete**

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Creating Quick Surveys

Use this procedure to create a quick survey. Use a quick survey or ad-hoc survey to survey internal stakeholders either inside or outside of a project.

Prerequisites

You can only create quick surveys in sites that include SAP Ariba Sourcing or SAP Ariba Supplier Information and Performance Management (classic architecture).

Context

A survey you create inside a sourcing or Supplier Performance Management (SPM) project is one of the project's documents. A survey you create outside the project is an independent document and is stored in your personal workspace. The participants you invite to a survey can see the survey from the time you publish it until it closes. While it is open, internal participants from your organization see the survey in the **To Do** content item on their dashboards.

> **Note**
> If you create a quick survey in your personal workspace, other users can't see it in search results.

Procedure

1. Perform one of the following actions:
    - To create a survey outside a project, on the dashboard, click **Create** > **Quick Survey.**
    - To create a survey inside a sourcing or SPM project, navigate to the project's **Documents** tab and choose **Actions** > **Create** > **Survey**.
2. Select the **Ad-hoc Survey** template.
3. Enter header information for the survey, such as a name and description, base language, optional commodities, and so forth.
4. Set the survey rules as follows and click **Next**:
    - Select whether you want to manually publish the survey or schedule it for publication at a specified date and time in the future. If you schedule the survey for future publication, you can manually publish it before the scheduled date.
    - Enter a fixed due date and time, or specify a duration. If you specify a duration, you can select an interval that starts when you publish the survey. If you specify a fixed time, you can choose a calendar date and a time of day for the response period to end. Select **Reminder** and click **Edit** to configure email reminders to participants as the due date approaches.
    - Select whether you want to allow scoring and blind grading on the survey. If you allow scoring, you can assign weights to the possible answers to your survey questions on the content page to assist your scoring of the participants and their responses.
    - If you want participants to receive all event notifications related to the survey, select **Yes** for **Would you like to include the bidder agreement as a prerequisite?**. By default, participants receive an event notification letting them know they've been invited to participate in the survey. Participants only receive other event notifications for a survey if the bidder agreement is a prerequisite and they've selected **Intend to Participate**. Other event notifications can include end date reminders and notifications that the event has reopened, been canceled, been edited and republished, or had its closing time changed.
5. Invite participants as follows and click **Next**:
    - Click **Invite Participants** and enter search criteria to find participants such as external suppliers or internal users. Select the participants you want to invite to the survey and click **OK**. Click **Invite Another Participant** to invite additional participants.
    - Click **Excel Import** and import a list of participants in a Microsoft Excel file.
6. Add content to the survey by clicking **Add** and choosing any of the following types of content:
    - Choose **Section** to add an organizational container for other survey content. Sections are similar to folders, and can contain any kind of content, including other sections. If you intend to score the survey and are using nested sections, note that only the weight points in the first level of sections count towards maximum total points.
    - Choose **Table Section** to add a question in table format, with defined column and cell field types, then add rows to the table.

- Choose **Question** to add a question, then enter question text and set options for the question such as answer type, whether participants can specify any values in the answer or must choose from pre-defined values, whether a response is required, and whether participants can see each others' answers.
- Choose **Requirements** to add a statement to communicate information about your expectations, then enter requirement text and set options for the requirement such as whether a response is required. You can also attach reference documents to a requirement.
- Choose **Attachments from Desktop** to upload a document from your computer and attach it to the survey.
- Choose **Attachments from Library** and enter search criteria to find a document in the Sourcing Library and attach it to the survey.
- Choose **Content from Library** to copy project content such as questions, table sections, or requirements in the Sourcing Library to the survey.

> ⓘ Note
>
> **Sourcing Library** content includes content from the supplier profile questionnaire. Conditional content in the supplier profile questionnaire impacts survey answers and vice versa. If you add conditional supplier profile questionnaire content that is visible to the supplier, and has been answered, to a survey where it is hidden from respondents, a blank answer is pushed back to the supplier profile questionnaire. That blank answer overwrites any existing answer. If you add conditional supplier profile questionnaire content that is invisible to the supplier, meaning that it has not been answered, to a survey where it is visible to respondents, respondent answers are pushed back to the supplier profile questionnaire.

7. Review the survey information on the **Summary** page.
8. Click **Schedule** or **Publish** to publish the survey and send it to participants.

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Viewing a Project's Activity History

Use these steps to view an audit trail of project activities and changes on the project's **History** tab.

Prerequisites

For supplier request, registration, qualification, disqualification, modular questionnaire, and process projects:

- The advanced view for the project type must be enabled.
- Your site's configuration determines who can access the advanced view for a type of project if it's enabled. If access to the **Advanced View** link is controlled by membership in the **SM Advanced View Access** group, members of that group can access the advanced view of a project. Otherwise, the project owner and members of the **SM Ops Administrator** and **SM ERP Administrator** group can access the advanced view of a project.
- You must navigate to the project's **Advanced View** before you can view the **History** tab.

For SAP Ariba Sourcing and SAP Ariba Contracts project types, you must be the project owner or a team member with permission to manage the project to view the **History** tab.

Context

The **History** tab displays an audit trail of changes to projects and activity in projects. The entries are created from database log and user sign in activities and actions to show who edited header fields, who opened documents and when, who completed tasks and when, and so forth.

Each entry contains the following fields:

- **Time Stamp:** Date and time the event occurred.
- **User**: Name of the user whose action is recorded.
- **Type**: Type of object for the action, such as **Workspace**, **Task**, or **Document**.
- **Title**: Name of the object for the action, such as My Workspace.
- **Details**: The action, such as **Edited** or **Created**.

Procedure

1. Navigate to the project's **Overview** area and choose **Actions** > **Display** > **Full View**.
2. To filter entries:
   a. Navigate to the **Search Filter** area under the **History** tab. Select or specify values for the filter fields as appropriate:
      - **User**
      - **Timestamp**
      - **Type**. Select the type of entry. To select audit entries for activities performed on the project, choose **Workspace**. To select all entry types, choose **No Choice**.
      - **Title**. Specify words in the title of the audit entry.
      - **Overview Field Name**. The choices are dependent on the value of the **Type** field. To use this field, choose a value for **Type** other than **No Choice**.
      - **Contract Attributes**. SAP Ariba displays meaningful choices only if the project is a contract workspace and the value for **Type** is **Workspace**.

   b. Click **Search**.

   Choose **Type** > **Workspace** and **Overview Field Name** > **Commodity** and click **Search** to display all audit entries for events related to the Commodity field.
3. If an entry has blue hyperlink text in the **Details** column, you can click the hyperlink value in the **Details** column.

   For example, an entry for a contract workspace contains the value **Edited** in the Details column. Clicking **Edited** displays the following details about the edit to the workspace:

   ```
   Food Beverage and Tobacco Products was added to Contract Workspace (Procurement)
   Commodity
   ```
4. **Optional:** To export the entries to a Microsoft Excel file, click the table icon and choose **Export to Excel** > **Export All Rows** or **Export to Excel** > **Export Current Page**.

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Exporting Tasks to Microsoft Outlook

Use this procedure to export tasks assigned to you to Microsoft Outlook.

Context

SAP Ariba supports one-way integration with Microsoft Outlook to:

- Keep track of upcoming tasks if you are offline for a time
- Provide a way to track progress in a more familiar tool

> ⚠ Limitations
>
> - Export to Microsoft Outlook is only available from the **My Tasks** content item.
> - You cannot import tasks from Microsoft Outlook to SAP Ariba.
> - Modifying a task in Microsoft Outlook does not update tasks in SAP Ariba. There is no synchronization capability between Microsoft Outlook and SAP Ariba.

Procedure

1. Enable DFS.
2. On the SAP Ariba dashboard, click **Manage** > **My Tasks**.
3. Click the table options icon and choose either **Export to Outlook** > **Export all Rows** or **Export to Outlook** > **Export Current Page**.

   Exporting all rows exports all tasks on the **My Tasks** content item to Microsoft Outlook, regardless of their visibility on the screen. Exporting the current screen exports only the tasks shown by the current filter settings.

   A message displays across the top of the **My Tasks** content item indicating the number of tasks exported to Microsoft Outlook.

4. All exported tasks appear in the Tasks folder of Microsoft Outlook.

Results

After you have exported to Microsoft Outlook once, every subsequent export has the option of keeping all previously exported tasks or deleting previously exported tasks. Deleting all previously exported tasks before exporting the current tasks keeps tasks folder current. It can also be useful if you cancel or put on hold a project, and prevents you from having to manually delete numerous tasks.

Keeping previously exported tasks is useful if you are still working on one or more tasks, and do not want to remove them, but need to export new tasks.

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Integration of SAP Ariba Projects with Microsoft Project

SAP Ariba integration with Microsoft Project enables you to:

- Export a complicated project to Microsoft Project so you can discuss the project with team members outside of SAP Ariba before processing further.
- Import tasks from a Microsoft Project to populate numerous tasks in a new template or project, or change the task structure of a template or project.
- Export a project to give an overview of the project to someone without access to SAP Ariba.

Requirements

Microsoft Project integration is supported with Microsoft Project versions 2010, 2013, and 2016. Microsoft Project versions 2000, 2002, and 2003 are deprecated. If you are using Microsoft Project version 2003 or earlier, SAP Ariba recommends that you upgrade to Microsoft Project version 2010 or higher.

To use Microsoft Project 2016 or 2013 with SAP Ariba cloud solutions, you must request support for integration with the Microsoft Project version you want to use. Please have your Designated Support Contact log a service request to enable UP-205 and the `Application.ACM.MSProjectIntegrationEnabled` parameter. An SAP Ariba Support representative follows up to complete the request.

Limitations

- Microsoft Project integration is available only in English.
- Integration with Microsoft Project is not intended for use as a mass edit function, so do not attempt to use it to overwrite a group of tasks. For example, if you create multiple tasks in a template, export them to Microsoft Project, then delete some tasks from the Microsoft Project file, and import it, the deleted tasks still appear in the project.
- You cannot load dependencies in Microsoft Project into SAP Ariba. Examples of dependencies are based on or offset dates in Microsoft Project, which SAP Ariba ignores.
- If you have complicated dependencies between phases and tasks in your project, the export to Microsoft Project might use an unexpected date. Because there are more date fields in SAP Ariba than in Microsoft Project, the mapping is not always exact.
- Recurring tasks are not supported in the SAP Ariba integration with Microsoft Project.
- Microsoft Project integration does not support the following characters in the data you export:
  - commas
  - parentheses
  - square brackets (`[ ]`)

  When exporting tasks to a Microsoft Project where an item name contains unsupported characters, SAP Ariba generates an error and the name appears blank in the project file.

Converting Output Files

When you export a project to Microsoft Project, you generate an XML file (`.XML` extension). To open an exported XML file with MS Project, right-click the file, choose **Open With**, and select MS Project. To import data from MS Project to SAP Ariba solutions; you must save MS project data with a `.MPP` extension to import it to your SAP Ariba solution.

Options for Importing Tasks from Microsoft Project

You can use the following options when importing tasks to a project or template from a Microsoft Project file:

- Date Offset
  When importing tasks from a Microsoft Project (.mpp) file to a project, you can choose to use Date Offset. If you choose to import using Date Offset, the import calculates the number of days between the begin date in the Microsoft Project file and each task, and sets the offset accordingly.
  For projects, if you do not use Date Offset, you must use Fixed Date. For templates, you must use Date Offset.
- Fixed Date
  Selecting the Fixed Date option during the import of tasks from a Microsoft Project file adds each task to the project with the an assigned date in the Microsoft Project file. There is no Fixed Date option for templates.
- Overwriting matching tasks
  The Microsoft Project import overwrites only tasks that have the same name. If task names do not match, the tasks in the Microsoft Project file are added to the project. You can control the overwrite behavior using the Overwrite matching tasks field, which will:
  - Copy all tasks into the project or template whether or not they previously existed. For this behavior, select **No** in the Overwrite matching tasks field.
  - Remove all tasks with the same name from the project or template and replace each with the task of the same name from the Microsoft Project file. For this behavior, select **Yes** in the Overwrite matching tasks field.

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Exporting an SAP Ariba Project to Microsoft Project

Use this procedure to export an SAP Ariba project to Microsoft Project.

Procedure

1. Navigate to the project or template you want to export to Microsoft Project. Make sure you are viewing the project or template in Full View.
2. On the **Tasks** tab, click **Actions** > **Microsoft Project** > **Export**.
3. Choose the location to save MPX file. The file name matches the project title (with + signs instead of spaces) for the tasks tab you are exporting from.
4. View the file by opening it in Microsoft Project.

Importing Tasks from Microsoft Project to an SAP Ariba Project

Use this procedure to import tasks from Microsoft Project to an SAP Ariba project.

Context

> ⓘ Note
>
> During task export to Microsoft Project, users might be prompted to open or save twice. This behavior is not due to SAP Ariba, but is caused by Microsoft Windows settings.

Procedure

1. Navigate to the project or template you want to import tasks to.

   If you are importing tasks to a template, make sure that:

   - the template is in **Draft** mode
   - you are viewing the template in **Full View**
2. Navigate to the **Tasks** tab.
3. Click **Actions** > **Microsoft Project** > **Import**.
4. On the **Import Microsoft Project File** page, select the MPP file (not MPX file) to upload, and choose whether or not to overwrite existing tasks.

   > Note
   >
   > You cannot import MPX project files.

   If you choose to overwrite matching tasks, you effectively delete all template tasks and replace them with the tasks from the Microsoft Project file. If you choose to not overwrite matching tasks, the tasks you specify in the Microsoft Project file are added to the template. The overwrite adds tasks to the template that already exist in the Microsoft Project.
5. Click **Import to Project**.

Management of Project Teams

When you create a project, you specify a team of users to work on the project.

About Project Teams

When you create a project, you specify a team of users to work on the project.

A project team consists of project groups. Each project group has different roles, which specify the permissions for the users in that group. The permissions specify the objects the users can access and what actions the users can perform in that project. Creating groups with different roles enables you to assign users to the project team with different roles and capabilities.

Select the **Team** tab to see the project groups for a project. (In guided sourcing, select the team icon, ?, which is next to the project name in the upper-left corner of a project page.)

Group members can be individual team members or global groups. For example, `Legal` is a global group. Global groups differ from project groups. Project groups are specific groups that are working on a project. Global groups function for all SAP Ariba solutions, not just a single project. However, you can add a global group to a project group to associate all members of the global group with the project.

Users can be members of both global groups and project groups, but membership in a project group does not automatically assign a user to a global group or assign any permanent access to the user. Conversely, being a member of a global group generally does not confer the same rights in a project, with exceptions for the global groups listed in Additional Users with Project Owner Capabilities [page 126].

In addition to team membership, there are access controls that can be set at the document or project level. These access controls enable a project or document owner to refine the control of project team member access to a project or document. Each project or document has associated access control settings. Users who satisfy the access control settings are able to view the project or document and potentially modify it. Users who do not satisfy the access control settings cannot view the project and are unaware that it exists.

Membership in a project group allows users to perform certain tasks at a project level, not a global level. If you want to give a large group of people access to a project, set the access control rather than adding them as team members. Add people as team members if you have a small group of people who need to receive notifications and participate in the project.

ⓘ Note

Groups defined in a project are different from the groups you add from the Ariba Administrator page. Creating a group of users from the Ariba Administrator page organizes the users into a group but does not associate the group with any projects.

Parent topic: Management of Project Teams [page 124]

Related Information

Project Owner Group and Capabilities [page 125]
Project Group Roles [page 128]
Team Inheritance in Subprojects [page 132]
Creating and Editing Project Groups [page 133]
Configuring Access Control Lists to Control Edit Access to Sourcing Event Content [page 135]

Project Owner Group and Capabilities

Every project team has a Project Owner group. In general terms, the Project Owner group is the most powerful group in a project and always has special capabilities and access rights, independent of any roles assigned to it.

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Unique Characteristics of the Project Owner Group

The Project Owner group has the following unique characteristics:

- SAP Ariba creates a Project Owner group for every project.
- You cannot delete the Project Owner group.

- The Project Owner group always contains the user in the **Owner** field for the project. By default, SAP Ariba initially sets this field to user who creates a project, so the Project Owner group initially contains the user who created the project.
- To specify members of the **Project Owner** group that are inherited by projects created from a template, you must use the method for automatically populating project groups that is supported for the project type. Depending on the project type, that method can be either buyer category assignments or team member rules. By default, users added to to the **Project Owner** group in a template from the **Team** tab are members of the **Project Owner** group for that template project only; they are **not** inherited by any projects created using that template.
  You can configure engagement risk assessment projects to inherit users from the **Project Owner** group in the template used to create the project. See Allow engagement Project Owner groups to inherit project group membership from the template.
- The Project Owner group always has certain permissions and access rights regardless of any roles assigned to it. For descriptions of these permissions and rights, see Project Owner Capabilities [page 127].
- External users, such as suppliers, cannot be members of the Project Owner group.
- A member of a Project Owner group in any project is counted as a licensed user, which may affect the terms of your SAP Ariba subscription. This would include a project owner who is not a member of any of the system groups whose members are counted as licensed users. For more information about licensed users, see Group Licensing Reference.

Additional Users with Project Owner Capabilities

The **Project Owner** group is unique because the following users have the same permissions and capabilities as members of the **Project Owner** group without being members of the group:

- Users who are on the project team (as a member of any project group) and are members of these global groups:
  - **Commodity Manager**
  - **Customer Administrator**
  - **Event Administrator**
  - **Project Administrator**
  - **Contract Administrator** (only valid for SAP Ariba Contracts projects)
  - **Internal Contract Administrator** (only valid for SAP Ariba Contracts projects)
  - **Sales Contract Administrator** (only valid for SAP Ariba Contracts projects)
  - **Event Administrator**(only valid for SAP Ariba Sourcing and SAP Ariba Contracts projects)
  - **Contract Project Administrator**
  - **Sourcing Project Administrator**
  - **Supplier Project Administrator**
- Project team members who are members of a project group that has the **Project Owner** role assigned to it. SAP Ariba also provides a **Project Owner role**. You can create a project group and assign it the **Project Owner role**, and members of that group will have the same permissions and access rights as members of the **Project Owner** group within that project.

Project Owner Capabilities

The Project Owner group has the following special permissions and access rights regardless of any roles assigned to it. Users with Project Owner capabilities can:

- View and edit project attributes, including access rights. When working with SAP Ariba Contracts projects, they can also change the contract state by publishing, amending, or closing the workspace.
- Delete and copy the project.
- View edit, and create documents, including subprojects, scorecards (SAP Ariba Supplier Management), events (SAP Ariba Sourcing), and surveys (SAP Ariba Sourcing and SAP Ariba Supplier Management), for which they have the appropriate access. The Project Owner group satisfies the requirements for the following access control settings:
    - Owner Only
    - Private to Team Members
    - Draft Access Restricted (members of the Project Owner group can access documents that have never been published even if they are not the document owner and Draft Access Restricted access control is set)
    - Classified
- View, edit, and create tasks, and task comments from reviewers, approvers, and negotiation partners.
- Create and edit project groups.
- View the project history (the **History** tab).
- View, create, and delete message board entries and announcements. Create message board labels and add messages to labels.
- Compose or read messages in SAP Ariba Sourcing events.
- Receive any project-related notifications, such as notifications for project status changes.

Global Groups That Can Access Projects Without Membership

Members of the Contract Project Administrator, Sourcing Project Administrator, and Supplier Project Administrator groups can access projects and workspaces without membership.

Users in the following global groups can edit projects and workspaces even if they aren't members of the projects or workspaces:

- Contract Project Administrator – can edit all procurement contract requests, procurement contract workspaces, internal contract workspaces, sales contract requests, and sales contract workspaces even if the user isn't a project team member
- Sourcing Project Administrator – can edit all sourcing projects, quick projects, and sourcing requests even if the user isn't a project team member
- Supplier Project Administrator – can edit all supplier workspaces even if the user isn't a project team member

Members of the groups in this list can also create projects and workspaces in the appropriate solution area. See the Strategic Sourcing and Supplier Management Group Description Table for more information.

Project Team Members Without Project Owner Capabilities

Project team members who do not have project owner capabilities cannot modify a project nor perform the actions listed in Active Team Member Restrictions [page 130].

Project team members who do not have project owner capabilities can:

- add project documents and tasks
- view project attributes
- view project items (documents and tasks) if they meet access control requirements

For more information, see Active Team Member Role [page 129].

Project Owner Group Restrictions

A user belonging to the Project Owner group cannot:

- Delete objects inherited from the template, such as project documents or tasks.
- Change a required task inherited from the template to an optional task.
- Edit project groups with the template field **Can owner edit this Project Group** set to **No**.
- Bypass access controls configured at the project level, if the user belongs to a user group added to a project group of the project team, and the project group doesnt have the **Contract Administrator** role assigned.

> Example
>
> If the access control for a project is set to **Private to Team Member** or **Owner/Administrator Only**, and if a user belonging to the Project Owner group is a part of a user group that is added to a project group of the project team, and the project group doesn't have the **Contract Administrator** role assigned, the user won't be able to access the project.

> Note
>
> If you assign the **Contract Administrator** role to the project group to which the user group is assigned, then all the members of the user group, irrespective of whether they have Project Owner capabilities, will be able to access the project.

Project Group Roles

When designing templates or creating a project, you might want to create groups with different capabilities and access rights. You configure capabilities and access rights for a group by assigning a role to a group. You can create groups and assign these roles to groups at the template or individual project level.

The roles you can add to a project group include:

- **Project Owner** (see Project Owner Role [page 129])

- **Active Team Member** (see Active Team Member Role [page 129])
- **Observer Team Member** (see Observer Team Member Role [page 130])
- **Classified Access** (see Setting Access Controls on Projects and Documents [page 93] for more information)
- **Access Participants Messages** see Access Participants Messages Role [page 131]
- **Team Member with Limited Access** (see Team Member with Limited Access Role [page 131])
- **Sourcing Content Editor** (see Sourcing Content Editor and Sourcing Supplier List Editor Roles [page 131])
- **Sourcing Supplier List Editor** (see Sourcing Supplier List Editor Role [page 132])

The most commonly used roles are **Active Team Member** and **Observer Team Member**. See Creating and Editing Project Groups [page 133] for additional helpful hints.

Parent topic: Management of Project Teams [page 124]

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Project Owner Role

Assigning the Project Owner role to a user-created project group gives members of that group all the capabilities of the Project Owner group, as described in Project Owner Group [page 125].

In addition, a member of a project group with the Project Owner role is counted as a licensed user,which may affect the terms of your SAP Ariba subscription. This would include a user who is not a member of any of the system groups whose members are counted as licensed users. For more information about licensed users, see Group Licensing Reference.

Active Team Member Role

In general, the Active Team Member role can add tasks and documents to a project. Specifically, users in a group with the Active Team Member role can:

- View and create the following items in the project:
  - Message board entries and announcements
  - Tasks
  - Documents, including subprojects, for which they have the appropriate access. The Active Team Member role satisfies the requirements for the Private to Team Members access control setting.

- View project groups.
- Receive any project-related notifications, such as notifications for project status changes.
- Add task reviewers or approvers and add comments when they are an active reviewer, approver, or watcher in a task.
- Create follow-on projects.
- Compose or read messages in events (applicable to SAP Ariba Sourcing only).

Active Team Member Restrictions

Users in a group with the Active Team Member role have all the restrictions of a Project Owner member (Project Owner Group Restrictions [page 128]). In addition, if they do not have Project Owner capabilities, they cannot:

- Edit project attributes.
- Edit or view a document if they are not the document owner or do not meet access requirements.
- Edit or submit tasks if they are not the task owner.
- Create tasks for a document if they are not the document owner.
- Add or edit project groups.
- View the project history (the **History** tab).
- Copy or delete the project.
- Delete message board entries or announcements.
- Create message board labels.
- Change the contract state (applicable to SAP Ariba Contracts projects).
- Create a subagreement (applicable to SAP Ariba Contracts projects).

Observer Team Member Role

In general terms, the Observer Team Member role can view information about a project but cannot create tasks or documents. Specifically, users in a group with the Observer Team Member role can:

- Create or edit project announcements.
- Read messages in events (applicable to SAP Ariba Sourcing only).
- View project groups.
- View tasks.
- View documents, including subprojects, for which he has access. The Observer Team Member role satisfies the requirements for the Private to Team Members access control setting.

Observer Team Member Restrictions

Users in a group with the Observer Team Member role have all the restrictions of the Project Owner group (Project Owner Group Restrictions [page 128]) and Active Team Member role (Active Team Member Restrictions [page 130]). In addition, they cannot:

- Create documents.
- Create tasks.

Access Participants Messages Role

The Access Participants Messages role gives users read-only access to view supplier messages in the **Messages** tab of an event. This role is intended for users that do not normally access events but need to view supplier messages. It is not necessary to use this role with groups that already include Can Access Participants Messages permissions.

Team Member with Limited Access Role

Users in a group with the Team Member with Limited Access role can:

- View and create the following items in the project:
  - Message board entries and announcements
  - Tasks
  - Documents, including subprojects, for which they have the appropriate access. The Team Member with Limited Access role satisfies the requirements for the Private to Team Members access control setting.
- View project groups.
- Create follow-on projects.

Use with the Strategic External User Access Feature

If you have the Strategic External User Access feature enabled and want to add supplier users to a project team, create a group with the Team Member with Limited Access role and add the supplier users to this group.

Sourcing Content Editor and Sourcing Supplier List Editor Roles

You can use the Sourcing Content Editor and Sourcing Supplier List Editor roles to create partitioned events for SAP Ariba Sourcing.

Normally, only event team members who have project owner (event owner) capabilities can invite participants to the event; these users can also view the responses from all participants. In a **partitioned** event, you assign users who do not have project owner capabilities to a project group with the **Sourcing Supplier List Editor** or **Sourcing Content Editor** role. These users can invite participants to the event and view only responses from the participants that they invited, or a partition of the event. Members of a group with the **Sourcing Content Editor** role can also edit specific content items if edit access is granted to the group.

Users who have project owner capabilities can still view all items and suppliers in a partitioned event and can view responses from suppliers invited by all the team members.

For more information about partitioned events, refer to Creating Partitioned Events in the Event Management Guide.

Sourcing Supplier List Editor Role

The **Sourcing Supplier List Editor** role has the **Edit Sourcing Supplier List** permission, which enables addition or removal of suppliers from the sourcing event.

Sourcing Bid Term Editor Role

The **Sourcing Bid Term Editor** role is given to a project group member who can override terms after bidding ends. They can also import the post-bid term override Excel file. They can view the **Post-bid term override** option from the main menu and update the terms that are configured to override after bidding is complete.

Team Inheritance in Subprojects

A subproject is a project owned by another project—its parent project. By default, a subproject inherits the **Project Owner** group (and other information) from its parent project. SAP Ariba creates a special project group that is a reference (a link) to the parent project's **Project Owner** group and places it in the **Project Owner** group for the subproject. Because this special project group is actually a reference to the **Project Owner** group in the parent project, changes to the **Project Owner** group in the parent project are reflected in this group. This project group has the following name:

```
Project Owner (
parent_project_name
)
```

If you create the subproject using the same template as the parent project, SAP Ariba also creates references to the other project groups inherited from the template and places them in the appropriate project groups for the subproject.

By default, a user inherited as a team member from the parent project but later removed from the subproject retains team membership capabilities in the subproject. If the user had Project Owner capabilities in the subproject, these capabilities are also retained. To disable this behavior, have your Designated Support Contact log a service request to configure the `Application.ACM.ProjectAccessControl.CanManageSubProjectIfCanManageParentProject` site configuration option. For more information about this option, see Site Configuration Options for Project Templates in Project Template Guide.

Users can disable this behavior by configuring the **Keep team membership capabilities after removal from subproject** (`Application.ACM.InheritTeam.ParentProjectTeamIsConsideredSubprojectTeam`) parameter. For more information on how to manage this paramater, see Intelligent Configuration Manager Administration.

Access to Private Parent Projects

A team member who belongs only to a subproject cannot view the parent project if the parent is marked as private. If subproject team member needs to access the parent project, you must add that member as a team member for the parent project.

Parent topic: Management of Project Teams [page 124]

Related Information

About Project Teams [page 124]
Project Owner Group and Capabilities [page 125]
Project Group Roles [page 128]
Creating and Editing Project Groups [page 133]
Configuring Access Control Lists to Control Edit Access to Sourcing Event Content [page 135]
Site Configuration Options for Project Templates
Intelligent Configuration Manager Administration

Creating and Editing Project Groups

Use this procedure to create and edit project groups.

Prerequisites

You must have **Project Owner** capabilities (be a member of the **Project Owner** group or a project team member who meets the requirements listed in Additional Users with Project Owner Capabilities [page 126]) to create project groups.

By default, all projects contain a Project Owner group. This group has special capabilities, as described in Project Owner Group [page 125].

Context

When creating project groups, consider the following helpful hints:

- The most commonly used roles are **Active Team Member** and **Observer Team Member**.
- If you are adding supplier users to project teams, assign the supplier users to a group with the **Team Member with Limited Access** role. For more information, see Team Member with Limited Access Role [page 131].
- When creating project templates, you can include a project group with the **Observer Team Member** role, even if you do not have an immediate need for this role. You can later use project mass edit operations to add users to this group. (Project mass edit operations can add users to project groups but cannot add project groups or add roles to project groups.)

Procedure

1. In the **Overview** area of a project, click **Actions** > **Edit Team**.
2. To create a group:
    a. Click **Add Group**.

       The **Project Group Details** page opens.
    b. Enter a name for the group.

       Special characters are generally restricted in group names. However, you can use the special character "/" in a group name by following these steps:
        1. Save the group with a name that includes no special character.
        2. Publish the new version.
        3. Export the template.
        4. Navigate to the group and edit its name to include the "/" character.
        5. Save the renamed group.
        6. Import the template.
        7. The group name now displays with the "/" character.
    c. Define roles for the group. In the **Roles** field, click the **select** link to open a chooser for roles. Choose roles from the checklist. (See Project Group Roles [page 128] for descriptions of commonly used roles.)
    d. Click **OK**.
3. To add members to a project group: Click the expansion arrow in the **Members** field for the group or click the **Add more** link if it is present. Choose a name from the checklist, or click **Search more** and search for additional users. To remove a user from the group, click the expansion arrow in the **Members** field for the group and click the user name to clear the checkmark for the user.

   If you are adding users to the group and the template used to create this project has restrictions on group membership based on global group membership, the chooser shows only the members of global groups selected by the template author.
4. To add or remove roles from a project group:
    a. If the **Project Group Details** page is not already open for the group, open it by double-clicking the project group name from the **Team** page.
    b. In the **Roles** field, click the **select** link to open a chooser for roles. Select checkboxes for the roles you want to add or clear checkboxes for the rolese you want to remove. (See Project Group Roles [page 128] for descriptions of commonly used roles.)

c. Click **Done**. Click **OK**.

5. To remove a group from a project, go to the **Team** page. Select the radio button next to the group you want to delete and click **Delete**. If you are attempting to delete a project team that is actively used in the project, the server displays a **Delete Project Group** dialog box. Click **OK**.

   If you delete a project team that is actively used in the project (for example, the team is a node in an approval or review flow or the team is a member of another project team), the deleted team is replaced with the Project Owner team.

Task overview: Management of Project Teams [page 124]

Related Information

About Project Teams [page 124]
Project Owner Group and Capabilities [page 125]
Project Group Roles [page 128]
Team Inheritance in Subprojects [page 132]
Configuring Access Control Lists to Control Edit Access to Sourcing Event Content [page 135]

Configuring Access Control Lists to Control Edit Access to Sourcing Event Content

Use this procedure to configure access control lists to control edit access to sourcing event content.

Context

Groups added to the additional editor groups option for event contents must have the **Sourcing Content Editor** role set up on the Team page of the sourcing projects. To invite participants to events using this option, the groups must also add the**Sourcing Supplier List Editor** role.

> ⓘ Note
>
> > ⓘ Note
>
> The groups must add the roles before publishing events. You can edit the supplier list and the content of the sourcing event only if the event is in edit mode. You cannot make changes after the event is published.

Procedure

1. Create or open the sourcing project for which you need to provide edit access permissions to sections, items, item terms, or the list of invited suppliers.
2. In the **Team Members** section of the Team page, add groups having one or both of the following roles: **Sourcing Content Editor**, **Sourcing Supplier List Editor**.
3. On the **Content** page, navigate to the **Item** > **Edit** or **Section** > **Edit** sections, and choose the group having one of the two editor group roles by providing that value for the **Additional Editor Groups** field.
4. On the **Content** page, navigate to the **Item Terms** section, and choose the group having one of the two editor group roles by providing that value for the **Additional Editor Groups** field.

Task overview: Management of Project Teams [page 124]

Related Information

About Project Teams [page 124]
Project Owner Group and Capabilities [page 125]
Project Group Roles [page 128]
Team Inheritance in Subprojects [page 132]
Creating and Editing Project Groups [page 133]

Management of Project Documents

SAP Ariba provides a central storage system that enables you to store and manage multiple versions of project documents and to manage file access for multiple users.

SAP Ariba supports the following types of documents in projects:

- Non-assembled documents
  Non-assembled documents can be any non-executable file, including:

  Microsoft Word

  Microsoft Excel

  Microsoft PowerPoint

  ASCII

  Graphic files, such as PNG, BMP, JPEG, or GIF

  PDF

  Executable files that were added to projects in previous SAP Ariba releases can still be downloaded by users, but are downloaded in ZIP file format.
- Contract documents, which can be:
  - Assembled contract documents. An assembled contract document can have multiple subcomponents, or sections and clauses. Clauses can be stored and reused from the clause library. For information about features that can be used with assembled contract documents only, see Contract authoring guide.
  - Contract Line Items Documents (CLIDs). You can use CLIDs to integrate data with SAP Ariba Sourcing, with SAP Ariba Procurement solutions compliance contracts.
  - Contract Terms documents. If your SAP Ariba Contracts solution is integrated with SAP Ariba Procurement solutions, you can use a Contract Terms documents to link a contract workspace with a purchasing compliance contract request and to synchronize terms. For more information about Contract Terms documents, see Managing Contract Spending from Contract Workspaces.
- SPM Scorecards and Surveys
  Customers with a Supplier Performance Management (SPM) solution can include scorecards and surveys in SPM projects to collect information about suppliers
- Forms
  Forms are custom data entry documents that are designed to meet specific business needs. Examples of forms include project resource sheets, asset tracking forms, and deal sheets. For information that is specific to working with form documents, see Creating and Using Form Documents [page 164].
- Savings Forms
  Savings forms are a special type of form used to track savings and spend. Savings forms are supported in SAP Ariba Sourcing projects; if you have an SAP Ariba Contracts solution in addition to SAP Ariba Sourcing, savings forms are also supported in procurement contract workspaces and requests. For information that is specific to working with savings forms, see Use of Savings Forms to Track Savings [page 166].
- Order Forms
  You can create order form documents in sales contract requests and workspaces only. If you create a sales contract workspace from a sales contract request, all Order Form documents are copied to the sales contract workspace.
- Assembled PDF documents

An assembled PDF document is created by SAP Ariba from one or more project documents. The ability to create assembled PDF documents is an optional add-on feature that must be enabled by SAP Ariba. If you would like to enable this feature, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will contact you.

ⓘ Note

- When you deactivate a supplier organization, documents are no longer available on the **Documents** tab of any projects associated with them, including supplier workspaces. The only way to see project documents for a deactivated supplier organization is to reactivate them.
- To list the documents uploaded to the contract workspace or folder in the ascending order of their creation date with the earliest one appearing at the top, you must enable the `Application.ACM.DefaultOrderOfDocumentsToCreateDate` parameter. For more information, see Display documents in a contract workspace or folder in the ascending order of the created date in Intelligent Configuration Manager Parameters Reference.

About Project Documents

You can add documents to projects, such as instructions or reference material. You can also add reusable documents from the content library to projects.

Parent topic: Management of Project Documents [page 137]

Related Information

Loading a Document from Your Desktop [page 140]
Loading a Document from Another Project to Your Project [page 143]
Controlling Document Access [page 144]
Editing Document Attributes [page 146]
Replacing a Document [page 147]
Creating a Shortcut in Another Project to a Document in the Current Project [page 149]
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Extracting ZIP File Contents [page 152]
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Microsoft Word Integration with SAP Ariba [page 280]
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Contract Line Items Documents (CLIDs) [page 178]

Project Document Requirements

Project documents have name, size, and other requirements.

File Name Requirements

Files loaded as project documents cannot contain the following characters in their names:

`\ / : ? " < > | # + % &`

File names (including the full path and the filename itself) must not contain more than 241 characters. If a file name length exceeds 241 characters, SAP Ariba cannot load the file.

File Size Requirements

The maximum size for an individual file in a project is 100 megabytes (MB).

Microsoft Word Requirements

For information about Microsoft Word requirements when working with project documents, see Microsoft Word Integration with SAP Ariba [page 280].

Loading a Document from Your Desktop

Use this procedure to load a document from your desktop to your project.

Context

This procedure describes how to load documents to projects. This procedure does not describe how to load assembled contract documents; if you have an SAP Ariba Contracts workspace and want to load assembled contract documents, see Contract authoring guide.

Procedure

1. Navigate to the **Documents** tab.
2. Choose **Actions** > **Upload** > **Document** or **Actions** > **Create** > **Document**. Both commands enable you to load a file from your desktop to the project. The **Actions** > **Create** > **Document** command also enables you to load a copy of a file that already exists in another SAP Ariba project into the current project.

   SAP Ariba opens a **Create New Document** page. If you chose the **Actions** > **Create** > **Document** command, the page includes a **New Document** and a **Copy Document** tab.
3. To load a file from your desktop to the project, use one of the following methods:
   - Click **Browse** to search for the file.
   - Specify the full path of the file.
   - Drop a file icon in the drag-and-drop box.

   The file name and size must meet the requirements listed in Project Document Requirements [page 140].
4. In the **Description** field, add a description for the document.
5. In the **Base Language** pull-down menu, specify the base language for the document. SAP Ariba uses the base language to display the document to users whose interface language (set in their preferences) is set to a language for which the document has no translated text. For example, a document has the base language English with translations for French and Japanese. If a German user tries to view the document, SAP Ariba displays the English version because the document has no German translation and the base language is English.

   > Note
   >
   > If English is the default locale for your SAP Ariba site and a translation is available in English and the template base language but not in the user's preferred language, then the content appears in English.
6. If you are not working on an SAP Ariba Contracts project, ignore the **Use As** field.

   If you are working on an SAP Ariba Contracts project, the **Use As** pull-down menu can include the following options:
   - **Order Form**: This option is present if you are working on a sales contract request or workspace. If you create a sales contract workspace from a contract request, all Order Form documents are copied to the contract workspace.
   - **Contract Content**: This option is present if the document is a Microsoft Excel file and SAP Ariba Contracts is integrated with SAP Ariba Procurement solutions. The file will be used as a Contract Terms Excel File document. The file must meet the format requirements described in Managing Contract Spending from Contract Workspaces.
     If you have SAP Ariba Sourcing and you created the contract workspace from a sourcing event with pricing terms, SAP Ariba creates an Excel document titled Pricing Terms with this option set.
   - **Contract Compliance Attachment**: This option is present if SAP Ariba Contracts is integrated with SAP Ariba Procurement solutions. SAP Ariba Contracts will propagate the file to the procurement or invoice contract request.
     If you do not want to use the document for any of these functions, choose **None**.
7. The **Is Publish Required** selection buttons are present only if you are working with an SAP Ariba Contracts project. Select **Yes** if you want to require the document to be published before the contract workspace can be published. Signed or finalized documents also meet this requirement.

8. **Announce the creation of this new document**: Select this option if you want SAP Ariba to create an entry in the project **Announcements** area with information about the creation of this document.
9. **Unzip contents to project**: Select this option if you are loading a ZIP file and want to extract the contents directly to the **Documents** area. The extraction utility re-creates any folders in the original contents. You can also extract the contents after you have loaded the file. For more information, see How to Extract ZIP File Contents [page 152].
10. Click **Create**.

Results

SAP Ariba creates a copy of the document and stores it with the project on an SAP Ariba server.

> ⓘ Note
>
> If the Microsoft Word document had tracked changes, SAP Ariba accepts all changes in the copy of the document it stores with the project.

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Related Information

About Project Documents [page 139]
Loading a Document from Another Project to Your Project [page 143]
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Creating a Shortcut in Another Project to a Document in the Current Project [page 149]
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Loading a Document from Another Project to Your Project

Use this procedure to load a document from another project to your project.

Prerequisites

You must have read access to the document that you want to copy to use this procedure.

Context

Use this procedure if you want to create a new document that is a copy of a document that exists in SAP Ariba (typically, a document that exists in another project) and add the copy to your project.

Procedure

1. Navigate to the **Documents** tab.
2. Choose **Actions** > **Create** > **Document**.
3. Click the **Copy Document** tab.

   SAP Ariba displays a search page.
4. Specify search criteria and click **Search**. Alternatively, you can click the **Explore** radio button to display the project and document folders for your site, then search for a file to copy.
5. Select the file you want to copy.
6. Specify a name for the copy of the file. By default, the file is created with the following name:

   `Copy of file_name`

   Where `file_name` is the name of the existing file.
7. Click **Create**.

Task overview: Management of Project Documents [page 137]

Related Information

About Project Documents [page 139]
Loading a Document from Your Desktop [page 140]

Controlling Document Access

Use this procedure to control document access.

Context

You can control which team members can access documents. For example, if you set the access control for a document to Owner Only, only the document owner (opposed to the project owner) can view it in the project. Document and project access controls are described in Setting Access Controls on Projects and Documents [page 93].

You can set access controls on a document in a project template so that all projects created from that template contain that document with those access controls.

Documents can be modified by an individual or a group who is the owner of the document. A document cannot be owned by members of a non-owner group. To allow members of a non-owner group to edit a document, create a group and add all the members who you need to give access to make changes to the document and then make this new group the owner of the document.

To set access control on a document:

Procedure

1. Click on the document name from the Documents area in the project.
2. Choose **Action** > **Edit Attributes**.
3. Select the appropriate value from the **Access Control** menu.
4. Click **Save**.

Task overview: Management of Project Documents [page 137]

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Editing Document Attributes

Use this procedure to edit document attributes.

Context

Editing document attributes enables you to modify the description and other attributes specified when the document was loaded. In addition, you can specify:

- Access controls.
  Access controls enable you to restrict access to the document. For more information, see Setting Access Controls on Projects and Documents [page 93].
- An editor.
  An editor is a user or group that can modify the document in addition to the document owner. Specifying an editor enables you to allow an additional user or group to modify the document. An editor gains owner access capabilities for the document; an editor can view or modify a document that has Owner Only access control.

To edit document attributes:

Procedure

1. Click on the document name from the Documents area in the project.
2. Choose **Action** > **Edit Attributes**.
   a. Specify new or modified values in the new page that opens. See How to Load a Document From Your Desktop to a Project [page 140] for information about attribute fields.
   b. Click **Save**.

Task overview: Management of Project Documents [page 137]

Related Information

About Project Documents [page 139]
Loading a Document from Your Desktop [page 140]
Loading a Document from Another Project to Your Project [page 143]
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Replacing a Document

Use this procedure to replace a document.

Context

In general, you can replace any document except for assembled PDF documents with another document of the same type. For example, you can replace a document if you want to:

- Upload a modified copy of a desktop copy of a project document without using DFS.
- Revert to an older or different version of a document by replacing the current version
- Retain document history for an older document. Replacing a document with a new version retains the document history for the older document. If you delete the older document, you also delete its history
- Replace an internal document, such as a contract, with a supplier document
- Replace a document in a project with a more relevant one from a Knowledge Area
- Use a newer version of a document that is not yet in a template

> ⓘ Note
>
> You cannot replace a document with a document of a different type. For example, you can replace a Microsoft Word document with another Microsoft Word document, but not with a Microsoft Excel spreadsheet.

For SAP Ariba Contracts users: If you replace an assembled contract document, the documents history of changes for the replaced document are deleted and are not be visible in the Microsoft Word Reviewing Pane.

To replace a document:

Procedure

1. Click on the document name from the Documents area in the project.
2. Choose **Action** > **Replace Document**.

   A **Replace Document** page opens.
3. (Optional) In the **Description** field, enter text explaining why you are replacing the file.
4. Do one of the following:
   - To replace the document with a file from your local file system:
     1. Select **Upload**.
     2. Browse for the file, enter the file path, or drop a file icon in the drag-and-drop box.
   - To replace the document with a document that exists in another project:
     1. Select **Replace original document with a document from a project**.
     2. Choose if you want to open a search window to find the replacement document or explore (browse) projects to find the replacement document.
        To open a search window to find the replacement document, select **Search**. Enter search criteria and click **Search**. Select the document from the results and click **Replace**.
        To explore projects to find the replacement document, select **Explore**. Open project folders until you find the appropriate project and select the replacement document. Click **Replace**.
5. If you selected a replacement document with a name does not match the original document, you can choose to replace the original document and change the project document name to match the replacement document name. Depending on the document type, you can also retain the original document name and replace the contents of the original document with the contents of the replacement document.
6. Enter information for the new document version. You can also edit document attributes, as described in How to Edit Document Attributes [page 146].

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Creating a Shortcut in Another Project to a Document in the Current Project

Use this procedure to create a shortcut in another project to a document in the current project.

Context

A shortcut is a link that provides read-only access to a document or folder. You can create a shortcut to a document or folder in your current project that appears in another project; a user viewing the other project can click the shortcut and view the document in your project. You must have write access to the project in which you are creating the link. Users must have read access to your document to access your document.

You can also create a shortcut in your current project that links to a document in an external project, as described in How to Create a Shortcut to an External Document (Shortcut Here) [page 150].

To create a shortcut to a document or folder in the current project:

Procedure

1. Click on a document or folder name from the **Documents** area in the project.
2. Choose **Action** > **Create Shortcut**.

   A **Create Document Shortcut** page opens.
3. In the **Title** field, modify the shortcut title, as needed. The default title is `Shortcut to document_name`, where `document_name` is the name of the document to which you are creating a shortcut.
4. In **Current Project**, select the project in which you want to create the shortcut.
5. Choose the folder in which you want to create the shortcut.
6. Click **Create**.

   A read-only page opens with attributes for the shortcut.

7. Click **Done**.

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Creating a Shortcut to an External Document (Shortcut Here)

Use this procedure to create a shortcut to an extermal document.

Context

A shortcut is a link that provides read-only access to a document or folder. You can create a shortcut in your current project (here) that links to a document in external project. To create a shortcut to an external document, you must have read access to the external document.

You can also create a shortcut to a document or folder in the current project that appears in another project, as described in How to Create a Shortcut in Another Project That Links to a Document in the Current Project [page 149].

To create a shortcut in your current project that links to a document in external project:

Procedure

1. To create a shortcut in the Documents area, click Action in the Documents area and choose **Create Shortcut Here**.

   To create a shortcut in a folder, click on the folder name and choose **Action** > **Create Shortcut Here**.

   A **Create Shortcut to Document or Folder** page opens.
2. In the **Title** field, enter a title for the shortcut. The default is `Shortcut to [selection]`.
3. Choose if you want to find the external document (or folder) by searching for the file or exploring projects.
   - To open a search window to find the external document (or folder), choose **Search**. Enter values in the Search Filter area and click **Search**. Select the document from the results and click **Create**.
   - To explore projects to find the external document, select **Explore**. Open project folders until you find the appropriate project and select the document. Click **Create**.

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Extracting ZIP File Contents

Use this procedure to extract ZIP file contents.

Context

You can load ZIP files as project documents and extract the contents. The extraction utility:

- Re-creates any folders in the ZIP file.
- Ignores any disk identifiers (such as `C:`) in the file path.
- Does not extract any executable files in the ZIP file.

Some of the functionality for this feature is controlled by the following site configuration options, which SAP Ariba sets for you. See Site Configuration Options for Extracting ZIP File Contents [page 429].

To extract ZIP file contents:

Procedure

1. Use one of the following methods to extract the contents:
   - When you load the document, select **Unzip contents to project**. The extracted files and folders are saved directly below the **Documents** area.
   - After you have loaded a ZIP file, right click the document name and select **Action** > **Unzip Contents to Project**. The extracted files and folders are saved relative to the project folder containing the ZIP file. The files are extracted using a background process.
2. To view the status of the extraction process and a list of the files extracted and not extracted, right click the ZIP file document name and select **Action** > **View Unzip Status**.

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Related Information

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Downloading Project Attachments to a ZIP File

SAP Ariba enables you to use this procedure to download some or all project attachments in a single ZIP file. This allows you to quickly download multiple project attachments to review on your computer.

Prerequisites

Users must have access to the project in order to download project attachments. The ability to download some or all of a project's attachments in a single ZIP file is available for all project types that have a **Documents** tab.

Context

Choose the documents and folders you want to download. The amount of time it takes to download your documents varies based on the number and total file size of the documents you choose.

The folder structure of project documents is maintained in the ZIP file. An entry is added to the **Audit Log** when a user downloads project attachments. The entry in the **Audit Log** contains the following information:

- Name of user downloading documents
- Date
- Documents downloaded

Procedure

1. Navigate to the **Documents** tab of the project for which you want to download project attachments.
2. Click **Actions** > **Download** > **Documents**.

   SAP Ariba displays the **Download Project Documents** page.
3. Choose the documents and folders you want to download and click **Download**.
4. Choose the location on your computer where you want to save the ZIP file.
5. Click **Save**.
6. Click **Done** to return to the **Documents** tab.

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Using DFS to Synchronize Local Document Changes with Project Documents

This procedure describes how to use DFS to synchronize local document changes with project documents.

Context

If you have DFS enabled, SAP Ariba detects when you have made a change to a desktop copy of a project document but have not uploaded it to the project. If you do not have DFS enabled and have made changes to a desktop copy of a project document, use the procedure in How to Replace a Document [page 147] to upload the modified document.

SAP Ariba opens the Document Update dialogue box when:

- you attempt to exit a project without uploading modified desktop copies of project documents
- the first time you edit and save a project document
- (SAP Ariba Contracts) you edit and save an assembled contract document (Main Agreement or Contract Addendum) on your desktop without uploading the changes to the project

If you made changes to desktop copies of project documents without uploading the changes, you will see a yellow exclamation point and a note.

The note might also contain the clickable link, **What do you want to do?**

You can click this link and SAP Ariba will give you an option to upload your desktop copy to the project or discard your changes.

To upload a desktop copy of a document to a project:

Procedure

1. If you have a Document Update dialogue box or document dialog box with a **What do you want to do?** link, click **Update Now**.

   Alternatively, navigate to the Documents area and click the name of the document that has changed (that has the yellow exclamation point). Choose **View Details**. Click **Action** > **Update Now**.
2. Choose if you want to create a new document version with your changes or save your changes without creating a new document version. If you create a new Enter information for the new document version to be created with your changes, or choose to upload your changes without creating a new document version (continue working with the current document version).

   If you create a new document version:
   - The version number is incremented. All changes made to the previous version are saved. Users can view the previous version by clicking **View Details** for the document, opening the **Version History** tab, and clicking the previous version number.
   - If there is an active task associated with this document, creating a new document version cancels the existing task round and creates a new task round if either of the following conditions are true:

- The **Repeat for Each Document Draft** option is set in the project template and the document status was **Published** before you created a new document version.
- The **Repeat for Each Document Draft** option and the **Extend Repeat Option for Unpublished Drafts** option are set in the project template.

If you do not create a new document version, the version number remains unchanged.

For more information about document versions, see Viewing and Managing Project Document Versions [page 156].

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Viewing and Managing Project Document Versions

Use this procedure to view and manage project document versions. Creating document versions enables you to archive document contents. There is no limit on the number of versions for a document, but there can be only one active version of a document. You can view a list of previous document versions with information about modification dates and the user who created each version. You can also view the contents of previous document versions.

Context

When you save the changed contents or attributes of a document, you are asked **Save these changes as a new version?**. You can choose to create a new document version (**Yes, save as v** n+1 or **No, save and continue editing v** n, where n is the current document version number.

If you create a new document version:

- The version number is incremented. All changes made to the previous version are saved to the new version. Users can view the previous version by clicking **View Details** for the document, opening the **Version History** tab, and clicking the previous version number.
- If there is an active task associated with this document, creating a new document version cancels the existing task round and creates a new task round if either of the following conditions are true:
  - The **Repeat for Each Document Draft** option is set and the document status was **Published** before you created a new document version.
  - The **Repeat for Each Document Draft** option and the **Extend Repeat Option for Unpublished Drafts** option are true.

If you do not create a new document version (you choose to continue editing the current version), the version number remains unchanged.

The document version number is used with the **Status** field to indicate the state of a document. The **Status** field can have the following values:

- **Draft**: The version has not been published. Publishing or submitting an approval task for a document with a Draft status increments the document version.
- **Published**: The most recently published version.
- **Archived**: A version of a form document that has been published but is not the most recently published version. After a version becomes archived, the SAP Ariba solution no longer loads data from that version for reports.

The following table shows an example of how user actions affect the document version and status:

Action	Version	Status
Upload an ad hoc document to a project.	**Original**	**Draft**
Create a project and view a document from the template.	**v1** (all documents originating from templates begin as v1)	**Not Edited** (For SAP Ariba Contracts assembled contract documents, the status is **Not Generated**.)
Modify a document with the version v1 and choose **No, save and continue editing v1**.	**v1(editing)**	**Draft**
Modify a document that has the version v1(editing) and choose **save as v2**. You can add a comment to the new version.	**v2**	**Draft**
Publish a document that has the version **v3**.	**v3**	**Published**; if this is a form document, the status of all previously published versions becomes **Archived**
Modify a published document with the version v3 and choose **Yes, save and continue editing v3**.	**v3 (editing)**	**Draft**

Action	Version	Status
Publish a document that has the version **v3(editing)** and **Draft** status.	**v4**	**Published**; if this is a form document, the status of all previously published versions becomes Archived
Submit an approval task on a document with the version v4 and **Draft** status.	**v4**	**Draft**
Submit an approval task on a document with the **version v4(editing)** and **Draft** status.	**v5**	**Draft**

Procedure

1. Navigate to the **Documents** area of a project.
2. To view information about the current (active) version of a document, click the document title and choose **View Details**. This shows you information about the current (active) version of the document.
3. To view information about all document versions, click the **Version History** tab to see information about previous versions. You can click a version number and select **Action** > **Open** to view the contents. You can also view attribute information about a previous version or copy the contents to the project.

   If the document is a form document, the output also includes a report icon ( ) that indicates the version used as a data source for reports. For example, if you have a form created from a form template that has the **Report Only Published** option enabled, the the most recently published version of the form will have a report icon, even though there might be a newer (but unpublished) version of the form. In the next data load, the SAP Ariba solution will load data from the version of the form with the report icon for reports.
4. To compare versions of Microsoft Word documents, open the **Version History** tab for a document. Under the area for the most recent version that you want to compare, select **View Changes** > **Compare with Previous Version (version n)**.
5. To delete all previous draft versions of a document:
   a. Verify that you are viewing the most recent version of the document.
   b. Click the document title and choose **Delete Old Versions**.
   c. Confirm the deletion of all previous draft versions of the document.

   When you delete previous draft versions of a document, all comments and announcements relating to those versions are deleted, and any associated tasks (no matter what state they are in) of the deleted versions are updated to associate with the most recent version of the document.

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Related Information

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Management of Documents Using the Documents Tab

The **Documents** tab displays the documents in your project. Project templates typically provide a default set of documents.

The following table lists that tasks you can perform from the **Documents** tab. The available tasks can vary depending on the document type.

To Do This...	Choose...
Open a document to edit	The document name and choose **Open**. The document opens in its associated editor.
View document details	The document name and choose **View Details**. You can view the description, status, version, owner, editors, base language, date last modified, creation date, keywords, access control, conditions, and **Version History** tab. See Viewing and Managing Project Document Versions [page 156] for more information about document versions. Click **Actions** to work with the document, or choose **Actions** > **Tasks** to initiate tasks to associate with the document.
Edit the document attributes	The document name and choose **Edit Attributes**. You can edit the document title, description, owner, editors, add keywords, and change the access controls. See Setting Access Controls on Projects and Documents [page 93] for details on access control.

To Do This...	Choose...
Copy the document to reuse it in multiple projects	The document name and choose **Copy** to copy the document to a new version of the document with a new name, or to copy it to another project. ⓘ Note You cannot copy assembled PDF files.
Move a document to another folder in the project	The document name and choose **Move** to move the document.
Make the document available	The document name and choose **Publish**.
Make a document you use often easy to access	The document name and choose **Add to Quick Links**, to list the document name at the top of the **Documents** tab, and in the Quick Links area on the **Overview** tab. You can later choose **Remove From Quick Links**.
Lock a document so others cannot modify it	The document name and choose **Lock**. Later, you can choose **Unlock** to open the document so other team members can modify it. If you create a task and lock the document (by setting the Lock Document field to **Yes** when submitting), the document locks normally. When you complete the task (by clicking **Mark Complete** button), the document unlocks. If you lock a document that does not have an associated task manually, the document stays locked until either you or a user with owner access unlocks it. You can also lock content at the folder level, and all documents underneath that folder or contained in that project are locked as well. Locking an entire project locks its associated documents, not the project itself.
Delete a document	The document name and choose **Actions** > **Delete**. The project owner can delete any document for which they are an owner, except documents that were added from the template or documents with tasks that have been started. Be careful when deleting documents. SAP Ariba cannot tell if a document is attached to a project. If you delete a document that is attached to a project, the link is deactivated.
Save a new version of the document	The document name and choose **Save as New Version**. You cannot save new versions of documents originating from the template. See Viewing and Managing Project Document Versions [page 156] for details.
Replace a document	The document name and choose **Replace Document**. You can replace the document with a document you upload, or a document from another project. The two documents must be of the same type. See How to Replace a Document [page 147] for details. ⓘ Note You cannot replace an assembled PDF document.
Replace a locked document	You can replace a **locked** document with a new document even if you do not belong to the same active owner group. When a document is locked, the **Replace Document** button is not shown in the **Document and Task** main tab. However, you can see the **Replace** button inside the task page, which can be used to replace the locked document.
Access a document outside the project	The document name and choose **Create Shortcut**. This allows you to specify a shortcut for the document in the current project or in another project. You can associate tasks with shortcut documents. You can specify shortcuts for folders as well.

To Do This...	Choose...
Create tasks to associate with the document	The document name and choose **Create New Task** > **To Do** , **Review**, **Approval**, **Negotiation**, **Signature**, or **Notification**. See About Tasks [page 300] for more information about tasks.
Search for documents	**Actions** > **Search** to search among documents associated with the project.
Upload a document to your project	**Actions** > **Upload** > **Document** to upload a document to your project. Browse for the file, enter the file path, or drop a file icon in the drag-and-drop box. Teams edit these documents, and the application creates a new version of the document after each edit, automatically storing previous versions. For details on documents versions, see Viewing and Managing Project Document Versions [page 156]. Documents you upload must have a filename (including full path and the filename itself) of 241 characters or less. If the filename exceeds 241 characters, your document cannot upload. Also, the document name must not contain any special characters. You can format the document description text with bold, italic, underlining, lists, or colors. When you upload a document, you can specify whether the document must be published in order for the project to be published using the Is Publish Required flag. You can also specify whether there should be an announcement of the creation of the new document. See Loading and Managing Project Documents [page 139] for details. **Note** Observers can upload documents.
Create a folder	**Actions** > **Create** > **Folder** to create a folder to organize your documents. If you have an empty document folder in a project that you want to copy using Copy Project, the empty folder is not copied over into the new project. Only document folders containing documents are copied.
Create an analytical report	**Actions** > **Create** > **Analytical Report** to create a report. After you create the report, you can save it to your project on the **Documents** tab. See Creating Analytical Reports for details on creating reports.
Export data to an Microsoft Excel template	**Actions** > **Create** > **Reporting Excel Template** to browse for an Excel template to use for data export. See Creating Report Export Templates for details on working with report Excel templates.
Create a compound report	**Actions** > **Create** > **Compound Report** to create a compound report. After you create the compound report, you can save it to your project on the **Documents** tab. See Creating Compound Reports for details on creating compound reports.
Load a document into the project	**Actions** > **Create** > **Document** to select a new document to add to the project or to search for a document that already exists in SAP Ariba to copy to the project. See Loading and Managing Project Documents [page 139] for details.
Create and generate a PDF document	**Actions** > **Create** > **PDF Document** to create and generate a PDF (Portable Document Format) document from one or more content documents. See Using Assembled PDF Documents [page 273] for details.

To Do This...	Choose...
Create a form	**Actions** > **Create** > **Form**. Forms are only available if your company has implemented them. A form is an electronic representation of a business form. You select the template to use for the form from a list of available templates, give the form a unique name, fill it out, and save it. A form can be approved, reviewed, and stored on the **Documents** tab like any other document. You can save the form as a new version or maintain the current version. Use the **Save these changes as a new version** buttons to select a new version or to use the current version. You can save forms in draft state, and publish them once you have completed them. Form content is available for reporting. Form types are customized for your company's business needs. If you need new types of forms for additional tasks, contact your system administrator. ⓘ Note The form that you use might not seem like a conventional document (and can even perform a specific function, such as savings tracking), but all forms must reside in the **Documents** tab of a project. For more information, see Creating and Using Form Documents [page 164].
Add a URL as a document	**Actions** > **Create** > **URL** to add a URL as a document. Click the URL icon in the document list to navigate to the web page for the URL. Use this to communicate knowledge located on the web to your team, and to store those references in the project.
Add a contract to associate with your sourcing project	**Actions** > **Create** > **Contract**. If you are working in a sourcing project and have an SAP Ariba Contracts solution, you can create a contract workspace. The contract workspace resides under the **Documents** tab of your project.
Create a compliance contract request	**Actions** > **Create** > **Contract Terms**. If you are working in an SAP Ariba Contracts workspace and have integrated SAP Ariba Procurement solutions, you can create a compliance contract request. For more information, see Managing Contract Spending from Contract Workspaces.
Add an event to your sourcing project	**Actions** > **Create Event**. If you are working in a sourcing project, you can start the event creation wizard. See Event Management Guide for details on working with events.
Create a savings form to use with your project	**Actions** > **Create** > **Savings Form**. Create a form to track savings and spend, including negotiated, implemented, and actual savings. You can add savings forms to full sourcing projects, or to SAP Ariba Contracts procurement contract workspaces and requests if you have SAP Ariba Sourcing. See Using Savings Forms to Track Savings [page 166] for details.
Create a survey	**Actions** > **Create** > **Survey**. Create a survey to collect qualitative and quantitative information about suppliers from a group of survey participants. For more information, see Running Supplier Performance Management Reviews.
Create a content document	**Actions** > **Create** > **Content Document**. If you are working in a full sourcing project, you can add a content documents, such as KPIs, sections, lots, line items, questions, requirements, attachments, cost terms, formulas, and library content. You can add weights to the content and use scoring.

To Do This...	Choose...
Create a folder shortcut	**Actions** > **Create** > **Shortcut** to create a shortcut to your current project or any other project you have access to.
Create access to a document or folder in another project	**Actions** > **Create** > **Shortcut here** allows you to create a shortcut to a document or folder in your current project or in an outside project.
Create a subproject for the project	**Actions** > **Create** > **Subproject** to create a subproject.
Create a guided sourcing quick project from a full project	**Actions** > **Create** > **Guided Sourcing Quick Project** to create a guided sourcing quick project from a classic sourcing full project. For more information, see Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event.

Parent topic: Management of Project Documents [page 137]

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Creating and Using Form Documents

Use this procedure to create form documents. Form documents are custom data-entry pages designed for a specific organization's business needs.

Context

To add form documents to a project, your site must have templates implemented for form documents. Templates for form documents are implemented by SAP Ariba for customers. For more information about using SAP Ariba Services to implement forms for your site, please contact your SAP Ariba customer representative.

Examples of forms include:

• Contract provisions	• Deal sheets
• Certificates of liability	• Performance issue tracking forms
• Asset tracking forms	• Product component lists
• Project resource sheets	• Product testing sheets
• Incident forms	• Product data sheets
• Compliance quizzes	• Address/telephone change requests
• Travel requests	• Software installation requests
• Capital purchase authorizations	• Return merchandise authorizations
• New employee setup forms	• Educational reimbursement requests

Forms provide the following features:

- Form documents have header fields and can have line item fields (or detail fields). Line items are multiple instances (lines) of the same fields and are useful for creating lists of items with the same fields, such as a list of items in a sales order.
- Each field has a specific data type, such as text, integer, money, date, or a custom data set. Fields can also have pick lists or drop-down menus.
- You can specify if fields are required, editable, or visible. You can also create conditions based on other field values to determine these properties.
- Field values can be calculated from other field values. In this example, **Cost** is calculated by multiplying **Quantity** by **Unit Price**.
- Header fields values can be calculated as the sum of line item field values. In this example, the **Total Cost** is the sum of the line item **Cost** values.
- Header fields can be used as search filters when searching for documents; line item fields are not searchable.
- A form can be pre-configured with tasks in a project template as a prototype form document. When the form document is created in a project, the tasks are also created.
- Form documents are not stored as files on the SAP Ariba server, but you can export line items to a Microsoft Excel document (see step 3).

- Field values can be exported for reports.

Procedure

1. To create a form document:
   a. Navigate to the **Documents** tab.
   b. Choose **Actions** > **Create** > **Form**.

      The SAP Ariba solution opens a **Create New Form** menu with a list of form templates. If there are prototype form documents in the project template, the menu lists them at the top. If the template author limited the number of instances that a prototype form document can be created in a project (created ad hoc), the menu will not list the document after the limit is met.
   c. Select the form template you want to use.
   d. Complete the information on the **Create New Form Document** page. If the form has line item fields, click **Add** to add line items.
   e. Click **OK**.
2. To modify how line items are displayed in the form document:
   a. Click the table icon ( ) in the line item area of a form document to open the **Table Options Menu**.
   b. Select or clear columns to show or hide in the **Show / Hide Columns** area. Select columns in the **Group by Column** area to group entries with the same column value.
3. To export the line items to a Microsoft Excel document:
   a. Click the table icon ( ) in the line item area of a form document to open the **Table Options Menu**.
   b. Choose **Export to Excel** > **Export all Rows** or **Export to Excel** > **Export Current Page**.

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Related Information

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Use of Savings Forms to Track Savings

You use savings form documents with SAP Ariba Sourcing to track savings and spend to measure the success of sourcing or supplier management programs, and to generate savings reports.

Savings form documents are supported in SAP Ariba Sourcing projects; if you have an SAP Ariba Contracts solution in addition to SAP Ariba Sourcing, savings forms are also supported in procurement contract workspaces and requests.

You can track savings for sourcing projects you create in SAP Ariba Sourcing, or for sourcing projects you are working on outside of the application. You can use savings tracking for various types of savings during the life cycle of a sourcing project, from the planned state to post-award; for example, you can add savings tracking forms to procurement contract workspaces and requests that are associated with, or will be associated with, sourcing projects.

> ⓘ Note
>
> The contract amount in a savings tracking form is not related to the contract amount in a contract workspace. You enter the contract amount in a savings tracking form separately.

Savings forms are disabled by default. To enable savings forms, the **Enable savings forms** parameter must be set to **Yes**. For information about this parameter, see Self-Service Site Configuration Options for Savings Forms [page 430]. For information about managing parameters, refer to Intelligent Configuration Manager Administration.

If the "Attachments for savings forms" (CF-2544) feature toggle is enabled, you can attach and delete documents directly in savings forms. You can also download all documents attached to a savings form when you click **Download All Project Documents**. SAP Ariba includes entries in the Audit log when you add, delete, and download savings form attachments. To enable the "Attachments for savings form" feature toggle, have your designated support contact create a service request.

Preventing Line Item Editing in Savings Forms

You can specify a period of time after which line items in savings forms are automatically locked to prevent editing. After savings forms are locked, only users belonging to the **Savings Form Administrator** group can make edits. The **Can Lock Allocation Rows** rule in savings forms controls whether rows can be locked.

You can configure configure savings form templates in the following ways:

- Allow or restrict the ability of users to edit line items after a period of time
- Define a period of time, after which, line items are automatically locked
- Delegate the ability to change these values to users creating savings forms

For more information about configuring allocation locking in savings form templates, see Configuring Allocation Locking in Savings Forms.

Parent topic: Management of Project Documents [page 137]

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Microsoft Word Integration with SAP Ariba [page 280]
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Assembled PDF Document Specifications [page 287]

Use of Savings Data in Reports

The goal of entering and accumulating savings data is to use it in savings reports that enable you to monitor the various aspects of your savings and spend. You can use the data from the savings tracking form to run these savings reports to analyze your savings and spend:

- Savings Summary Report: This report displays the amount of savings your company has achieved for a given time period. It provides an executive overview of savings achieved by various departments.
- Savings Detail Report: This report displays spend and savings data for all projects executed in a given time period.
- Actual Savings Report: This report displays the amount of actual savings realized when you begin to purchase items per project.

These reports are comprised of project header data, event data as the event progresses, and savings data that you enter. See Running Analytical Reports for details on reporting. You can create multiple savings forms. In that case, the multiple forms are shown in the reports in multiple rows.

Parent topic: Use of Savings Forms to Track Savings [page 166]

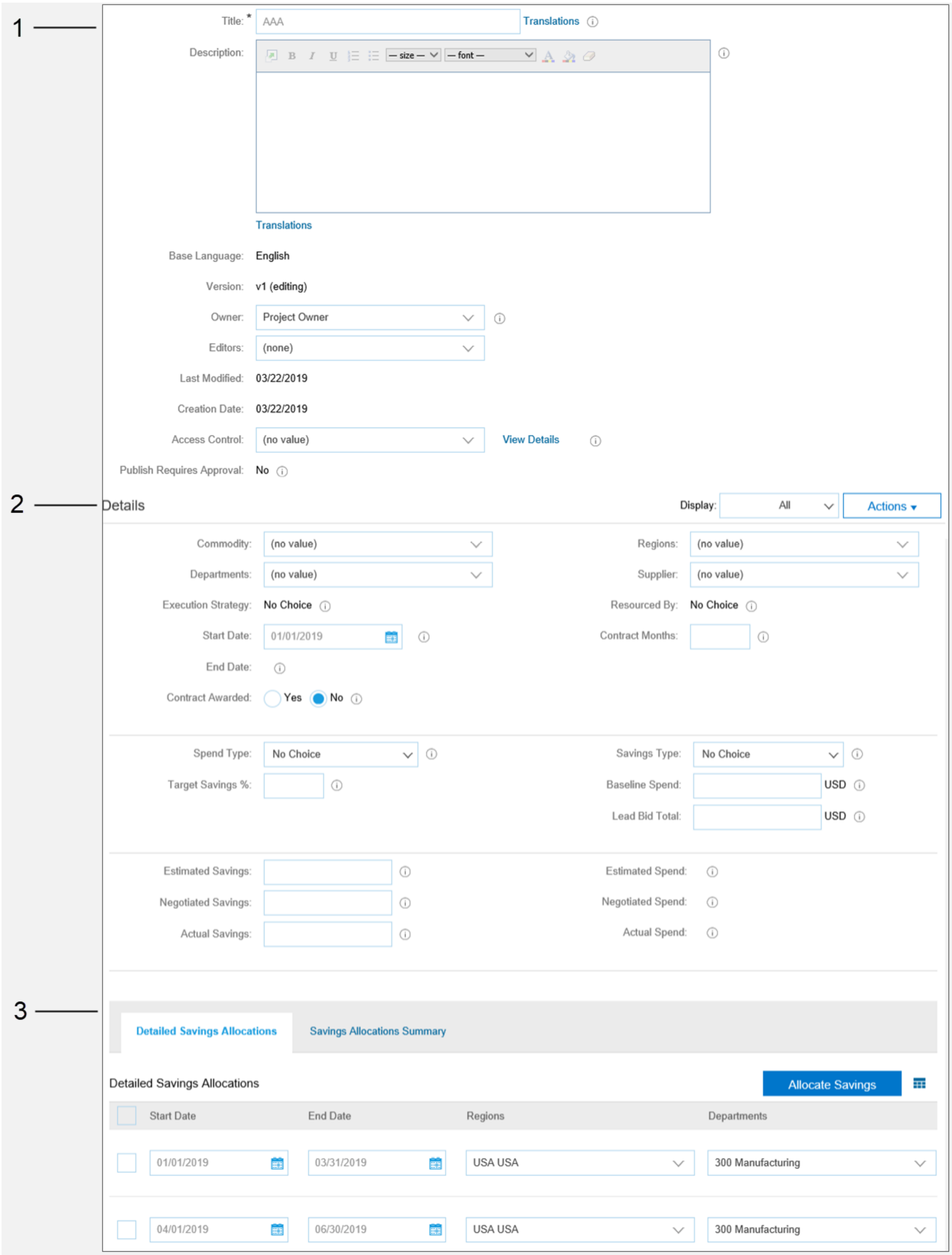
Related Information

Savings Form Sections [page 168]
Creating and Updating Savings Forms [page 173]
Loading Saving Allocation Details from an Excel File [page 175]
Printing a Savings Form [page 178]

Savings Form Sections

From top to bottom, a savings form has three sections:

1. **Document Information** (top section): General information and properties about the savings form document (such as the **Title**, **Description**, **Owner**, and access information).
2. **Header** (middle section, labeled **Details**): Contains savings information, including total ("rolled up") spend and savings amounts, commodities, and suppliers.
3. **Allocation Details** (bottom section): An optional section that enables you to break down, or allocate your savings data by time (months, quarters, or years) or other fields (dimensions) in your savings form, such as region or department. For example, you might want to record the savings realized by each department in your organization. This section contains the following tabs:
    - **Detailed Savings Allocation**: Use this tab to add line items with savings allocation information. Each line item has fields for the time period, savings and spend values, and dimensions. You can create multiple savings forms in a single project, so you can create different forms to allocate and analyze savings for a single project by different factors.
    - **Savings Allocations Summary**: This tab contains a summary of savings allocation values.


1
Title: *
AAA
Translations
Description:
— size —
— font —
Translations
Base Language:
English
Version:
v1 (editing)
Owner:
Project Owner
Editors:
(none)
Last Modified:
03/22/2019
Creation Date:
03/22/2019
Access Control:
(no value)
View Details
Publish Requires Approval:
No
2
Details
Display:
All
Actions
Commodity:
(no value)
Regions:
(no value)
Departments:
(no value)
Supplier:
(no value)
Execution Strategy:
No Choice
Resourced By:
No Choice
Start Date:
01/01/2019
Contract Months:
End Date:
Contract Awarded:
Yes
No
Spend Type:
No Choice
Savings Type:
No Choice
Target Savings %:
Baseline Spend:
USD
Lead Bid Total:
USD
Estimated Savings:
Estimated Spend:
Negotiated Savings:
Negotiated Spend:
Actual Savings:
Actual Spend:
3
Detailed Savings Allocations
Savings Allocations Summary
Detailed Savings Allocations
Allocate Savings
Start Date
End Date
Regions
Departments
01/01/2019
03/31/2019
USA USA
300 Manufacturing
04/01/2019
06/30/2019
USA USA
300 Manufacturing

The savings form header and allocation detail sections include the following field types:

- Savings Form Field Values from the Project Header [page 170]. These are general information fields that can be pre-populated or updated from the project header fields, including commodities, regions, departments, baseline spend, and target savings.
- Savings Form Field Values from SAP Ariba Sourcing Awarded Events [page 171]. These are fields that can uploaded from an SAP Ariba Sourcing awarded event in the same project, including negotiated amounts and leading bid amounts.
- Savings Amounts Fields [page 171].
- Baseline Spend and Spend Type Fields [page 172].
- Savings Type Field [page 172].

Custom fields can also be added to the savings tracking form document. See your local administrator to add custom fields to the form.

In addition to savings form fields that can have values uploaded from project header fields or event fields, you can configure savings form header fields to:

- Upload values to project header fields. See Savings Form Header Field Values Uploaded to Project Header Fields [page 172].
- Get values from the sum of allocation line items. See Savings Form Header Fields from Rolled-Up Line Values [page 173].

Parent topic: Use of Savings Forms to Track Savings [page 166]

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Savings Form Field Values from the Project Header

You can manually enter fields values into the savings form. When you create a savings form in a project, the following fields are pre-populated with fields from the project header.

The following fields are pre-populated with values from the project header:

- **Base language**
- **Commodity**
- **Regions**
- **Departments**
- **Baseline spend**
- **Target savings percentage**

- **Contract months**
- **Sourcing mechanism**
- **Execution strategy**
- **Contract effective date** (which is used as the start date on the savings form)

The values for these fields can also be updated from the project header during a project life cycle, as described in Creating and Updating Savings Forms [page 173].

Savings Form Field Values from SAP Ariba Sourcing Awarded Events

The following savings form field values can be uploaded from an SAP Ariba Sourcing awarded event in the same project:

- **Baseline spend** (can update value provided from the header information)
- **Negotiated spend**
- **Negotiated savings**
- **Lead bid total**

The values for these fields can also be updated from an event, as described in Creating and Updating Savings Forms [page 173].

Savings Amounts Fields

You can enter and edit the following savings form fields for savings amounts during any stage of your project or sourcing event:

- **Estimated Savings**: The savings that you estimate to accrue as a result of executing the project. Also known as forecasted, target, or expected savings. Enter this amount at the beginning of the project.
- **Negotiated Savings**: The savings negotiated during the project. This is typically the awarded savings. This can be derived from the project, or entered during the course of the project.
- **Implemented Savings**: Savings amount that could be implemented based on the contract. Also known as planned or contract savings. Enter this data after the contract has been awarded.
- **Actual Savings**: The actual savings realized when you begin to purchase items named in the contract. Also known as realized savings. Enter this data after the contract is being used to implement purchases and actual costs are known.

By default, savings amounts are shown in the event currency. If the savings form is for a multi-currency event, the **Allow currencies in savings allocation details** can be set to **Yes** to enable you to select a currency for each entry. For information about this parameter, see Self-Service Site Configuration Options for Savings Forms [page 430]. For information about managing parameters, refer to Intelligent Configuration Manager Administration.

Baseline Spend and Spend Type Fields

The values that are calculated in a savings form are based on baseline spend, which represents the amount of spend from which you want to base your savings. The **Spend Type** field allows you to specify the reason for your baseline spend value:

- **Historic**: The amount paid previously for the good or service.
- **Market**: The amount established by the market.
- **Estimated**: An estimated price established by the buyer.
- **Industry Published Price**: A price published in an industry journal or derived from other another third party publication.
- **Vendor Published Price**: A price published by a supplier or vendor.
- **Average of Opening Offers**: The average price resulting from running an initial quote such as an RFP.
- **Vendor Opening Offer**: A single supplier's quote (such as an incumbent), usually arrived at after running an RFI or RFP.
- **Budget**: The amount established by a budget.

Savings Type Field

The **Savings Type** field in a savings form enables you to specify the reason for your target savings value:

- **Cost Avoidance**: Indirect or "soft" cost savings that are indirectly related to the sourcing process and result in lower costs; for example, paying 5% more for a good or service when the industry average is 10%, or negotiating a delay in price increase.
- **Cost Reduction**: Direct or "hard" cost savings that are directly related to the sourcing process and result in lower costs.
- **Price Increases**: Savings achieved despite price increases; for example, if prices increase less than expected.
- **Asset/Inventory Recovery**: Savings achieved through reductions in excess inventory or assets.
- **Working Capital**: Savings achieved through acquisition or management of working capital.
- **Compliance**: Savings achieved through compliance with contracts.
- **Demand Management**: Savings achieved through central management of demand from different purchasing units.
- **Signing Bonus**: Savings achieved through a bonus for signing a contract with the vendor.
- **Rebate**: Savings achieved through a rebate from the vendor.
- **Vendor Paid Costs**: Savings resulting from the selected vendor paying some portion of costs, such as for shipping.

Savings Form Header Field Values Uploaded to Project Header Fields

A savings form header field can be configured by SAP Ariba so that its value is uploaded to a matching project field (a field with the same type and field name). The savings form field can be configured to either:

- Automatically upload its value to the project field.

- Prompt to ask if you want to upload the value to the project header.
  You will see a prompt similar to the following:
  Check this box if you would like Baseline Spend field(s) in the Project to be updated from the SavingsForm
  By default, the **Baseline Spend** field is configured with the prompt option.

Savings Form Header Fields from Rolled-Up Line Values

A savings form header field can be configured by SAP Ariba so that values from matching savings allocation line items are summed up and written (rolled up) to the form header field when the form is saved or published. By default, the following fields are configured with this option:

- **Baseline Spend**
- **Actual Savings**
- **Estimated Savings**
- **Implemented Savings**
- **Negotiated Savings**

Related Information

Creating and Updating Savings Forms [page 173]
Loading Saving Allocation Details from an Excel File [page 175]
Printing a Savings Form [page 178]

Creating and Updating Savings Forms

Use this procedure to create and update savings forms.

Procedure

1. To create a savings form:
   a. On the **Documents** tab of a full sourcing project, choose **Actions** > **Create** > **Savings Form**.

      If your savings form is part of a template, it might be a document that already exists in the **Documents** tab, or could be a document you choose from Document Choice. A savings form has all of the features of any document in the **Documents** tab, and can be worked on collaboratively, and have To Do tasks and approval, review, and negotiation tasks as needed.
   b. Enter the form title, description, and base language and click **Create**.

      The **Edit Savings Form** page opens. Fields listed in Savings Form Field Values from the Project Header [page 170] are pre-populated from the project header.

c. Enter or modify values as needed.

   You can include supplier IDs in the supplier selection list, and you can search by supplier ID. For more information, see Including the Supplier ID in Supplier Selection Lists and Searching Suppliers by ID in Event Management Guide.

2. To manually enter savings allocation details:
   a. Navigate to the bottom of the **Detailed Savings Allocations** area.
   b. To add a single line, choose **Add** > **Single Allocation**.
   c. To add one line for each contract month, choose **Add** > **Monthly Allocation**. The savings form automatically adds one line item for the number of months specified in the **Contract Months** field in the header and allocates your baseline spend over the months of the contract life. For example, if the value for **Contract Months** is 10, and your baseline spend is $12,000, and you select **Add** > **Monthly Allocation**, 10 line items are added, each with a baseline spend value of $1,200.

   > Note
   >
   > The **Add** > **Monthly Allocation** menu option appears only if you specify a value for the **Contract Months** field.
   >
   > If you have entered values for Contract Months and Start Date, but have not specified monthly allocations, you must specify whether you want to have monthly allocations when you publish the savings tracking form.

   d. Complete the fields in the line items and modify the time periods in the line items as needed.
      If you cannot edit a line item, the line item is locked based on the number of days that have elapsed since the start or end date for the line item. Only members of the **Savings Form Administrator** group can edit it.
3. To update or load savings header fields from a sourcing event in the same full sourcing project:
   a. In the savings form header area, choose **Actions** > **Update Savings** > **From Event**.

      A **Select Document** page with the documents and events in your project opens.
   b. Select the event from which you want to load data and click **OK**.
4. To update savings form header fields populated with values from the project header (Savings Form Field Values from the Project Header [page 170]) with current project header values:
   a. In the savings form header area, choose **Actions** > **Update Details From Project**.
   b. Click **OK** to confirm that you want to override existing values in the savings form.
5. To refresh the display and view new calculated values, navigate to the **Details** area and click **Actions** > **Refresh**.
6. **Optional:** Specify automatic locking line item parameters if your savings forms was configured to allow users to set them.
   a. Navigate to the bottom of the **Detailed Savings Allocations** area.
   b. To specify how savings allocation line items are automatically locked, choose one of the following values from the **Locking Mechanism** pull-down menu: **None**, **From Start Date**, or **From End Date**.
   c. To specify the number of days after the start date or end date to lock detailed allocation rows, enter a value in the **Lock Days** field.

   After a savings allocation line item is locked, only users belonging to the **Savings Form Administrator** group can edit it.
7. To modify the view:

- Select options from the **Display** drop-down menu to control the type of savings displayed, or to display all savings types.
- Click the **Savings Allocations Summary** tab to display a summary of how the savings data is allocated for each dimension.

8. Click **Save as Draft** or **Publish**. Clicking **Publish** publishes the savings form and makes the form values available for reporting.

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Loading Saving Allocation Details from an Excel File

Saving allocation details enable you to break down, or allocate your savings data by time (months, quarters, or years) or other fields (dimensions) in a savings form.

Prerequisites

If you want to allocate savings by a dimension, such as department, verify that the dimensions (fields) you want to use have values specified in the header section of the savings form. The values for these fields will be used to pre-populate the Excel spreadsheet and you cannot enter additional values for these fields in the spreadsheet. In most cases, the values for these fields will be populated from the project header.

By default, the following fields are available as dimension fields:

Commodity
Region
Departments

> ⓘ Note
>
> New or changed values for fields defined by flex-master data (FMD) cannot be imported from Excel files. Excel templates for savings form allocations have empty values for FMD fields. If you manually enter values for FMD fields in the Excel file, the values are ignored and not imported.

Procedure

1. Create or open a savings form.
    - To create a savings form, use the procedure in Creating and Updating Savings Forms [page 173].
    - To open an exisitng savings form, navigate to the **Documents** tab. Click the document name and select **Open**.
2. If the savings form does not already contain savings allocation details (line items), define the time periods and dimensions you want to use.
    a. Click **Allocate Savings**. The **Allocate Savings** button is in the top right corner under the **Detailed Savings Allocations** tab and only appears when the savings form is editable.
    b. The **Create Savings Allocation** page opens. Select the time periods and dimensions you want to allocate the savings across.

    > ⓘ Note
    >
    > The options on the **Create Savings Allocation** page are only available under certain conditions:
    >
    > - **Breakdown date by** is available only if values for both **StartDate** and **EndDate** have been specified in the savings form header.
    > - **Fields** are available only if they have corresponding values in the savings form header section. Administrators can add additional fields or restrict the values available for use as dimension fields.

3. Generate an Excel spreadsheet that you will edit to specify savings allocation values.
    - If you are adding initial savings allocation values and have the **Create Savings Allocation** page open, go to **Step 2** and click the **Click here to open an excel template based on the above selections** link.
    - If the savings form already has savings allocation values, click **Excel Export/Import** from the **Detailed Savings Allocation** tab of the savings form. The **Import Detailed Savings Allocation** page opens; go to **Step 1** and click the **Click here to open your detailed savings allocations in an Excel Spreadsheet** link.

    SAP Ariba exports all visible fields on the **Savings Form** page to the Excel spreadsheet.

    Fields with multiple values are displayed in the Excel spreadsheet in drop-down pick lists. If the length of all the multiple values exceeds 255 characters, the multiple values are not displayed in a drop-down pick list.

    The generated Excel spreadsheet contains 3 sheets:

Breakdown Percentage	In most cases, the Breakdown Percentage sheet is the only sheet you need to edit. You use the Breakdown Percentage sheet to allocate the percentages for each type of savings by date or dimension. Enter percent values in the cells indicated by color. The percentages you enter on this sheet are used to calculate the savings allocation detail values on the Detailed Savings Allocations sheet. You can enter values in the Savings percent fields only.
Savings Data	The Savings Data sheet displays data from the savings form header. The data in this sheet will be allocated into multiple detail rows based on the breakdown percentages. This sheet is read-only.
Detailed Savings Allocations	The Detailed Savings Allocation sheet contains the savings allocation detail rows. Savings values are calculated using the percentages specified in the Breakdown Percentage and Savings Data sheets. All the formula and dimension cells are read-only.

> ⓘ Note
>
> The **Department**, **Regions**, **Client**, **Commodity**, and **Supplier** fields are pre-populated from the header section of the savings form and are not displayed in Excel in drop-down pick lists.
>
> Values for fields defined by flex-master data (FMD) cannot be imported from Excel files. Savings form Excel templates have empty values for FMD fields. If you manually enter values for FMD fields in the Excel file, the file cannot be imported.

4. Edit the Excel file. When you have finished entering and verifying values, save the file to your computer desktop.
5. Upload the Excel file.
    - If you are adding initial savings allocation values, return to the **Savings Form** page. Under the **Detailed Savings Allocations** tab, click **Allocate Savings**. From the **Create Savings Allocation** page, go to **Step 3**. Upload your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
    - If you are replacing savings allocation values, click **Excel Export/Import** from the **Detailed Savings Allocation** tab of the savings form. From the **Import Detailed Savings Allocation** page, go to **Step 2**. Upload your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).

Results

The values from your Excel file are loaded as to Savings Allocation Details. Only values that can be edited on the **Savings Form** page are imported. You can manually modify the imported values in the **Detailed Savings Allocation** area on the **Savings Form** page.

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Creating and Updating Savings Forms [page 173]

Printing a Savings Form

Use this procedure to print a savings form.

Procedure

1. Click **Print** in the upper right corner of the page.
2. Click **Print** again in the **Print** panel.

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Related Information

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Contract Line Items Documents (CLIDs)

SAP Ariba Contracts procurement contract workspaces can contain contract line items documents. A **contract line items document**, or line items document, specifies terms of the contract, or the goods or services acquired by the contract. Each line item includes pricing information and terms, such as price and quantity.

> ⓘ Note
>
> Contract line items documents are not supported for Ariba Contract Management Basic customers.

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration. For information about the site configuration option used to enable this feature, see Site Configuration Options for Contract Line Items Documents [page 429].

Contract line items document contents can be standard capacity or large capacity.

Standard-capacity line items documents can contain up to 2000 line items. Users create, view, and modify items for standard-capacity line items documents by specifying values directly in the user interface:

	Name	Price			Quantity	Extended Price
	AAA	$10.00	USD	*	1,000	$10,000.00 USD *Fx*
	BBB	$20.00	USD	*	1,000	$20,000.00 USD *Fx*
	CCC	$30.00	USD	*	1,000	$30,000.00 USD *Fx*
	Add ▾	Edit ▾			Delete	Excel Import ▾

Users can also work with standard-capacity line items documents using Microsoft Excel files.

Large-capacity line items documents can contain up to 10,000 line items. Users must create, view, and modify items for large-capacity line items documents using Microsoft Excel files.

> ⓘ Note
>
> SAP Ariba recommends a maximum of 50 terms per line item in a CLID (Standard and Large-capacity).

A contract line items document can be used to integrate data with SAP Ariba Sourcing, and with SAP Ariba Procurement solutions compliance contracts.

You can also integrate SAP Ariba Contracts with an SAP ERP and send items from line items documents to the ERP; the ERP can then create an SAP contract (outline agreement).

If your site is configured with item material master data integration, users can also add items from material master data to a contract line items document. Users can also save line items to the Sourcing Library and add them to line items documents.

You can also specify line items in pricing terms Excel documents (also referred to as contract terms Excel documents; however, a workspace can contain either a pricing terms Excel document or a line items document, but not both. Users can create a line items document from a pricing terms Excel document.

Contract line items documents support the following features:

- Simplified Excel import of line items enables you to quickly add line items, including material master line items, to contract workspaces in SAP Ariba Contracts from a Microsoft Excel document. You can specify term values for line items, such as quantity and price. You can also specify values for custom terms. For more information, see Simplified Excel Import of Line Items [page 217].
- Line item copying to follow-on SAP Ariba Contracts procurement contracts. If you have a project with a standard-capacity line items document and create a follow-on procurement contract workspace, you can choose to create a line items document in the follow-on project and copy (propagate) items from the original line items document to the line items document in the follow-on project.
- Integration with SAP Ariba Sourcing.
    - Line items from an SAP Ariba Sourcing award can be propagated to a line items document. If you create a contract workspace from a sourcing event and select a template that contains a contract line items document, all the event items are automatically copied to the contract line items document. If you select a contract workspace template that does not have a contract line items document, you are prompted to choose if the event items will be placed in a contract line items document or a pricing terms Excel document.
    - Items from a line items document can be propagated to line items in a follow-on sourcing project. The menu option **Actions** > **Create** > **Sourcing Follow-on Project** on the **Overview** tab of a workspace

enables you to create a follow-on sourcing project from a contract workspace. If you create a follow-on quick sourcing project (an event), all the items from the line items document are automatically added to the content of the sourcing event. If you create a follow-on full sourcing project or a sourcing request, you can then create an event and use the new menu option **Add** > **Content from Contract Workspace** when editing event content to add some or all of the line items from the contract line items document.

> **Note**
>
> The **SC-21440: Excludes item term in CLID** feature enables SAP Ariba Contracts users to omit Item terms from the CLIDs when creating a contract from a sourcing event. For example, the Savings term can be excluded since contracts do not support historical prices. Contact SAP Ariba Support to enable this feature.

- Integration with external systems.
  - A line items document can be created with line items from an external system. The inbound web service, `Import Contract Line Items Document`, creates a contract line items document after receiving a request from an external system. The contents for the contract line items document are specified in a pricing terms Excel document, which SAP Ariba converts to a line items document.
  - If SAP Ariba Contracts is integrated with an SAP ERP, users can send items from a line items document to the ERP. SAP Ariba sends a cXML Contract Request document; the ERP creates a contract (outline agreement) and sends back a cXML Contract Status Update Request document with status information and information to identify the corresponding contract created on the ERP.
    If your site has SAP commodity codes mapped to SAP Ariba commodity codes, a line item is sent as data for a service item (SAP service specification) if the item:
    - has a **Commodity Code** value that is mapped to an SAP service item commodity code
    - has the **Item Category** set to **D (Services)**

    Notifications for events related to cXML Contract Request or Contract Status Update Request documents are sent to the **Contract Integration Notifications** group.
    Project data and items from a project's line items document can be sent to only one ERP. There is a one-to-one relationship between a contract workspace (and its line items document) and an SAP contract (outline agreement). If your site is integrated with multiple ERPs, you can create a "parent" line items document with items from multiple ERPs, then create follow-on projects, where each follow-on project contains a line items document with items from an individual ERP. You can then send the line item data to the appropriate ERP.

    > **Note**
    >
    > By default, SAP Ariba Contracts assigns line item numbers sequentially (1, 2, 3, and so on). In contrast, SAP ERP and SAP S/4HANA may use increments of 10 (10, 20, 30, and so on).
    >
    > When contracts are transferred between SAP Ariba Contracts and SAP ERP or SAP S/4HANA, these differences in numbering formats may lead to integration issues. To maintain data consistency and prevent errors, SAP Ariba recommends aligning SAP ERP or SAP S/4HANA’s line item numbering format with the sequential numbering used in SAP Ariba Contracts.
    >
    > If a customized numbering format is required in SAP ERP or SAP S/4HANA, you can configure it on the user interface or using the customization features available in SAP Integration Suite, managed gateway for spend management and SAP Business Network.
  - When SAP Ariba Contracts is integrated with an ERP system, either the material number or material code term value from the CLID, whichever is the latest added term, is used as the BuyerPartId in the ERP system. The BuyerPartId accepts empty cell values from the latest added term.

You can enable the `Application.ACM.UseMaterialNumberOrMaterialCodeAsBuyerPartId` parameter to use either the material number or material code term value, whichever is available in the CLID, as the BuyerPartId in the ERP system. If the CLID contains both material number and material code, then the value of the latest added term is used as the BuyerPartId in the ERP system. For more information, see Intelligent Configuration Manager parameters reference.

- Integration with SAP Ariba Procurement solutions.
  An SAP Ariba Procurement solutions compliance contract request can have items imported from a line items document by clicking the contract terms link document and selecting the **Actions** > **Import from Line Items** option.
- The ability to create document tasks (review, approval, and negotiation tasks) for line items documents. External reviewers receive an Excel version of the line items document, and reviewers without edit access can download an Excel version of the line items document. A reviewer can submit a modified copy of the Excel version of the line items document and task owners can use the **Compare** operation to generate an Excel document that compares the modified document with the original and then highlights the differences (**Display all line items from both documents including changed content**), or an Excel document that shows only the line items that were removed, added, or changed from the previous version (**Display only changed content**).
  In addition, the creator of a CLID document can view the content that was changed/added/deleted between a specified previous version and the current version (by opening the **Version History** tab for the CLID and selecting the previous version to compare against).
- The ability to review changes before publication. Unpublished line item data is visible to users and propagated to other SAP Ariba solutions, but only published item data is included when a line items document is sent to an ERP. The page to publish a line items document displays the differences between the current content and the last published version.
- Support for line items documents in project templates. You can add a line items document to a procurement contract workspace template.

> **Note**
>
> - If you add a line items document to a procurement contract workspace template and a user selects this template when creating a contract from sourcing award, SAP Ariba automatically creates a line items document with line items from the award.
> - When you create a contract workspace from a sourcing event and select a template with a contract line items document, all event items are automatically copied to the contract line items document. Some of the OOTB (out of the box) terms are not supported in the procurement contract workspace. Therefore, it is recommended to use custom terms in the sourcing event instead of OOTB terms.
> - The **SC-23041: Exclude Prototype merging for items added from Library** feature ensures that past event terms are not copied into the CLID when you create a procurement contract workspace from a past sourcing event and add items to the CLID from the item library. Only the terms defined in the current CLID template are applied. Contact SAP Ariba support to enable this feature.

- Templates for line items documents. If your site is integrated with an external system, such as an SAP ERP, a line items document template is created for the ERP. The primary purpose of a line items document template is to define the terms used in line items documents. If you create a line items document in a workspace which uses that external system, items added to the line items document will automatically be created with the terms specified in the template.
  Line items document templates are created in the **Contract Line Item Templates** folder in the **Templates** area.
- A **Contract Items** section in the **Overview** area of procurement contract workspaces that lists the first 10 items in the contract line items document.

- **Price Update** amendments that enable users to modify existing items in a contract line items document without triggering a new round of a review or approval task for the workspace. If there is a review or approval task for the workspace with the **Repeat for Each Document Draft** option set, completing a **Price Update** amendment does not trigger a new round of the task. Note that a **Price Update** amendment only permits existing items to be modified; line items cannot be added or deleted. When line items from a sourcing event are added to an existing contact, the amendment type is automatically set to **Price Update**. In such cases, if no CLID is available in the contract workspace, the items are added to the pricing terms Excel document.

> ⓘ Note
>
> A template contains a CLID or a pricing terms file, but not both.

- A **Contract Item** reporting fact, which contains fields from line items.
- Support for line items documents in legacy contract loads. You can create line items documents when importing legacy contracts. Legacy load ZIP files can include pricing term Excel files to be converted to line items documents and loaded.

Workflow for Contract Line Items Documents

- (Optional) A member of the Template Creator group creates a contract workspace template with a line items document.
- A line items document is added to a contract workspace using one of the following methods:
    - Automatically, at project creation time. A user creates a procurement contract workspace from a project template that contains a line items document. SAP Ariba creates an empty line items document.
    - An SAP Ariba Sourcing event completes and the event manager creates an award, then creates a contract workspace for the award and selects a procurement contract workspace template that contains a line items document; SAP Ariba creates a line items document that contains items from the event. (If the user selects a template that contains neither a pricing terms Excel document or a line items document, the user is prompted to select what type of document to create, and the user selects line items document.) The line items document is created with items from the award.

    > ⚠ Restriction
    >
    > Any attachments in the event are not copied to the contract workspace.

    - Manually, from a procurement contract workspace. A user navigates to the **Documents** area and selects **Create** > **Line Items Document**.
    - From a pricing terms Excel document. A user clicks the document name and selects **Create Line Items Document**.
    - If SAP Ariba Contracts is integrated with SAP Ariba Procurement solutions and a workspace has an associated compliance contract request (or compliance contract), a user can click the contract terms link document and choose **Export to Line Items**. The line items document is created with items from the compliance contract request (or compliance contract).
    - An external system uses the **Import Contract Line Items Document** web service to send a request to the SAP Ariba system with line item data.
- After the line items document is created, users add items.

If this is a standard-capacity line items document, users add items from the user interface and enters values for the **Price**, **Quantity**, and other terms. If the material master data integration feature is configured, users can also add content from the material master data.
If this is a large-capacity line items document, users add items using an Excel spreadsheet.

> ⓘ Note
>
> When adding an item to the **Line Items Document**, clicking **Done** saves or adds the item, while clicking **Cancel** discards all the changes. In the **All Content** section of the **Add Item** document draft page, clicking **Save as Draft** will only save the changes made to the values (**Price**, **Quantity**, and so on) on that page, while **Discard and Exit** will only discard the changes made to the values on that page.

- Tasks can be created for the line items document, including review, approval, and negotiation tasks. If the task is assigned to an external user for review or negotiation, the notification sent to the external user includes an Excel file with the contents of the line items document. If a reviewer completes the review and attaches a modified copy of the Excel file, the task owner uploads it and clicks the **Compare** link on the task details page to generate an Excel file showing the differences between the original version and the reviewed version.
- The line items document is published. If the document was previously published, the publish page shows a summary of the differences between the current contents and the last published version.
- If SAP Ariba Contracts is integrated with an SAP ERP and the line items document and workspace are published, the user can click **Send to External System** to send the line items and project header fields to the ERP. This data is sent in a ContractRequest cXML document to SAP Business Network, and then forwarded to the ERP.
- If the workspace is published and users want to modify items in the line items document, users must amend the workspace to modify the line items document. If the workspace has a task that is re-started each time a new draft of the workspace is created and you do not want to re-start the task, you can create a **Price Update** amendment for the workspace and change existing items in the line items document (users can edit existing items but cannot delete or add items). A **Price Update** amendment does not change the status of the workspace, so no new approval rounds are created for the workspace. When you have finished modifying the line items document, you can re-publish the document and complete the amendment.
- As the contract approaches its expiration date, you want to source the same items again. Users can create a sourcing follow-on project or event with data from the line items document by navigating to the **Overview** area of the project and selecting **Actions** > **Create** > **Sourcing Follow-on Project**.
- If you have a contract workspace with a standard-capacity line items document and create a follow-on project that is a procurement contract workspace, there is a new **Select line items from contract content document?** option. If you select **Yes**, SAP Ariba creates a line items document in the follow-on project and opens a page that enables you to copy items from the line items document contained in the original (predecessor) project.

Validation of Master Data

Validation of master data functionality ensures that changes to contracts are based on up to date information from the back-end master data and supporting templates. When you amend or publish a contract, SAP Ariba validates whether any changes have occurred in the associated back-end master data since the contract was last published. If changes were made, SAP Ariba displays a warning message indicating that the values being used are no longer valid.

> ⓘ Note
>
> Users can choose to ignore the warning message and continue amending or publishing the contract.

Master data is validated when:

- contract line item documents (CLIDs) are published
- published CLIDs are amended or edited
- CLIDs are imported into a Draft or Published Contract Workspace
- templates with custom terms, that have List of Choices as an answer type, are modified

Validation of master data is disabled by default. To enable this feature, have your Designated Support Contact log a service request. An SAP Ariba Customer Support representative will follow up to complete the request.

Parent topic: Management of Project Documents [page 137]

Related Information

About Project Documents [page 139]
Loading a Document from Your Desktop [page 140]
Loading a Document from Another Project to Your Project [page 143]
Controlling Document Access [page 144]
Editing Document Attributes [page 146]
Replacing a Document [page 147]
Creating a Shortcut in Another Project to a Document in the Current Project [page 149]
Creating a Shortcut to an External Document (Shortcut Here) [page 150]
Extracting ZIP File Contents [page 152]
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Using DFS to Synchronize Local Document Changes with Project Documents [page 155]
Viewing and Managing Project Document Versions [page 156]
Management of Documents Using the Documents Tab [page 159]
Creating and Using Form Documents [page 164]
Use of Savings Forms to Track Savings [page 166]
Assembled PDF Documents [page 273]
Using Document Choice to Create Events or Documents [page 279]
Microsoft Word Integration with SAP Ariba [page 280]
Desktop File Sync (DFS) [page 284]
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Creating Contract Line Items Documents (CLIDs) [page 223]
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Adding Items to Large-Capacity Contract Line Items Documents [page 241]
Publishing Contract Line Items Documents [page 243]
Editing Excel Versions of Contract Line Items Documents [page 243]
Sending Contract Data and Line Items to an SAP ERP or to SAP S/4HANA Cloud [page 250]
Sending Contract Data and Line Items to Multiple SAP ERPs [page 252]

Pricing Conditions for Contract Line Item Documents

You can request pricing from suppliers for a specified number of periods (months, quarters, or years) in sourcing events and contract line items documents.

Collecting pricing over time can lead to more accurate pricing. Event owners can define validity periods and specify pricing condition settings as part of the term's attribute definition. You can also map validity periods on pricing conditions to your external SAP ECC systems.

The following rules in the Line Item Document Header enable you to define pricing conditions:

- **Allow Pricing Conditions**: Choose **Yes** to allow enable validity periods. This rule must be enabled to use price by volume functionality in contract line item documents. Select **No** to disable validity periods.
  The following rules appear when **Allow Pricing Conditions** is enabled:
  - **Validity Period Type**: This field is required. This rule determines the type of period for which you want to collect pricing. The following options are available for this rule:
    - **Monthly**: Choose this value to collect volume pricing in monthly increments. For example, if you want the validity period duration to last 8 months, choose **Month** in this field and enter **8** in the **Validity Period Duration** field.
    - **Quarterly**: Choose this value to collect volume pricing in quarterly increments.
    - **Annually**: Choose this value to collect volume pricing in yearly increments.
    - **Buyer Defined**: Choose this value to enable event owners to define the **Validity Period Type** rule when they create events.
      - **Date Range**: This field displays when you choose **Buyer Defined**. Enter the date ranges for which you want the validity periods to apply.
    - **Perpetual**: Choose this value to collect volume pricing with no end date.
      - **End Date**: This read-only field appears when you choose **Perpetual**. This field indicates the date on which the validity for the pricing conditions end.
    - **Supplier Defined**: Choose this value to enable suppliers to define the validity period type when they submit their event responses.
      - **End Date**: This field appears when you choose **Supplier Defined**. Enter the date on which you want the validity period for the pricing conditions to end.
      - **VolumeThreshold**: This field appears when you choose **Supplier Defined**. Enter the volume amount that suppliers must exceed when submitting their responses.
  - **Start Date**: Date on which the validity pricing conditions begin. The validity period automatically ends after the duration time expires.
  - **Number of Periods**: The duration that the validity period lasts. For example, if you want the validity period duration to last 6 months, choose **Month** for the **Validity Period Type** field and enter **6** in this field.
  - **Renewal Period**. Choose a number from 1 to 365 to indicate the number of days before the expiry of the contract line item's pricing validity when the contract owner must be notified. The default value is zero. If you retain the default value of 0, no notification is sent.

    > ⓘ Note
    >
    > The background scheduled tasks run weekly, so it is recommended to enter a number greater than 8 to ensure that you receive at least one notification regarding the expiry of the pricing validity of your contract line items.
    >
    > Depending on the value you provide in the **Renewal Period** field, you receive an email with the subject line, Line Items Renewal Notification email. The email contains information about the contract line

items (and the associated contract workspaces) whose price by time validity is expiring. The email also contains an Excel document as an attachment. The Excel document provides detailed information about the contract line items, such as the contract workspace ID and name, supplier name, item name, the date of the last available price as provided in the **Number of Periods** field, and the last available price as of this date. For example, if the Start Date is Apr 2019 and the Number of Periods is 2, then the two periods are April 1-30 and May 1-31, and the date of the last available price will be May 31, 2019.

- **Scales**: Enter the volume tiers for which you want to collect pricing. For example, if you want to collect pricing for items at the 500, 1000, and 1500 volume tiers, you enter `500`, `1000`, and `1500`. You can add additional volume tiers as needed.
- **Enable period quantity**: Choose **Yes** to display the period quantity field on the pricing condition page.
- **Suppliers can view period quantity**: This rule appears when you choose **Yes** for the **Enable period quantity** rule. Choose **Yes** to show suppliers the period quantity field. The period quantity field appears as a non-editable field for suppliers.

Workflow for Price by Time in Contract Line Items Documents

- A buyer with the Template Creator group permission creates or edits a contract line item template and enables the **Allow Validity Periods** rule for the price term.
- A buyer publishes the contract line item document template.
- A buyer creates a contract line item document using the template.
- The buyer can click **Price by Time** in the **Price** column to view price by time data.

Next Gen UI for CLID

⚠ Caution

This feature is decommissioned as of the Q1 2025 release. The documentation is no longer regularly updated. Existing customers can continue to use the feature until further notice. However, new customers must use the classic user interface, available by default, to manage CLIDs in SAP Ariba Contracts.

The next gen UI for CLID offers an intuitive user interface that seamlessly integrates with the guided sourcing interface as well as the legacy user interface (UI) and provides enhanced capabilities for managing contract line items and distributing the line items to external systems. The next gen UI for CLID enables users to create and manage multiple contracts, including contracts from different purchasing organizations, in the backend ERP through a single CLID. Distribution capabilities in the next gen UI for CLID enables users to send the line items to corresponding purchasing organizations directly from the contract line item document. Further key enhancements as part of this feature include the ability to:

- create a new contract and contract line items from a guided sourcing event.
- add line items to an existing contract from an awarded event.
- add line items from the material master in ERP-integrated setups.
- edit contract line items in bulk or as inline edits.

- add and edit payment terms in contract line items.
- specify different currencies for a line item.
- export or import line item content by using Excel files.
- access contracts-related information from the **Summary** section of the **For You** tab. The **Recently viewed** section of the **For You** tab also lists contract documents that are among the four most-recently viewed documents.

The next gen UI for CLID is available only to members of the **Category Buyer** group.

Contract line items created in the legacy UI must be migrated to the next gen UI for CLID before you can access those line items from the next gen UI for CLID. Migration of contract line items from the legacy UI converts the following header fields in the legacy UI to the line-item fields in the next gen UI for CLID to support distribution of line items across various purchasing organizations:

- Pgroup
- Porg
- Supplier
- Company code
- Payment terms
- Related ID
- Line number
- Document type
- Document category

You can create a new contract or update an existing contract by selecting the awarded line items from the **Award** page of a guided sourcing event.

Prerequisites

Ensure that the following prerequisites are met before you start working in the next gen UI for CLID:

- Your site must have the parameter **Enable new CLID interface for material items** (`Application.ACM.EnableNewCLIDInterface`) enabled. Contact SAP Ariba Support for assistance.
  Your adminstrator must enable the **Enable support for nested items in CLID** (`Application.ACM.ContractLineItemsDocument.EnableAddItemInsideAnItem`) ICM parameter. For more information, see Enable support for nested items in CLID.
- You must be part of the **Category Buyer** user group.
- You must run the scheduled task **LineLevelERPTermsEnabler**.
- If you want to open the contract line item documents from existing workspaces in the next gen UI for CLID, you must migrate the contract workspaces in the legacy UI to the next gen UI for CLID. This is a one-time activity performed before you start using the next gen UI for CLID. For more information, see Preparation of a Site for the Next Gen UI for CLID [page 189].
- If you are using SAP Ariba Contracts integrated with an ERP system such SAP ERP, ensure that you add the necessary ERP terms to the prototype line item in the CLID template of the business system so that all the required ERP fields appear in the line-item table.
- To be able to use the guided sourcing features, your site must have guided sourcing enabled.

Restrictions

The following limitations and restrictions apply to Contracts NXG:

- The next gen UI for CLID support is limited to material line items. Lots and service line items are not supported in the next gen UI for CLID. Workspaces that contain lots or service line items are not migrated to the next gen UI for CLID and continue to open in the legacy UI.
- After a contract workspace is migrated from the legacy UI to the next gen UI for CLID, you cannot access the CLID from the legacy UI. Similarly, after you set a CLID to open in the legacy UI, you cannot revert that choice to open the CLID in the next gen UI for CLID.
- The next gen UI for CLID supports only standard-capacity events. Large-capacity events (events that contain more than 2000 line items) are not supported in the next gen UI for CLID.
- You cannot edit the Related ID field or the integrated fields from the next gen UI for CLID.
- The next gen UI for CLID does not support operationalizing of a contract in SAP Ariba Contract Compliance.
- The next gen UI for CLID does not support **Pricing Conditions** for line items.
- The next gen UI for CLID does not automatically add the values entered for ERP fields at the contract workspace header in the line items because it supports different ERP values for different line items. However, it does support bulk updates for multiple line items at the same time.

Workflow for the Next Gen UI for CLID

This topic explains the workflow for enabling the next gen UI for CLID on a site, migrating workspaces, and opening, editing, and creating contract line item documents from the next gen UI for CLID.

1. Your site must have the parameter **Enable new CLID interface for material items** (`Application.ACM.EnableNewCLIDInterface`) enabled. Contact SAP Ariba Support for assistance.
2. Run the scheduled task **LineLevelERPTermsEnabler** to add the header-level ERP fields from legacy contracts as line item terms in the next gen UI for CLID.
3. (Optional) Complete workspace migration if you want to use the next gen UI for CLID to open or edit any of the existing CLIDs
    1. Migrate existing workspaces to the next gen UI for CLID.

       > ⓘ Note
       >
       > Contract workspaces that contain lots or service line items are not supported for migration to the next gen UI for CLID.

    2. Verify the migration status.
4. To add awarded line items from a guided sourcing event to an existing contract, select **Add to existing contract in the new UI** option.

   > ⓘ Note
   >
   > If the event contains lots or servcie line items, an error message that says **The new UI is disabled** appears.

5. To open a CLID in the next gen UI for CLID, follow one of these options:
    - Click the line items document icon listed in the **Documents** tab.
    - Click the line items document dropdown in the **Documents** tab and select **Open**.

- In the **Contract Items** section, select **Actions** > **View and Edit Contract Items**.
- In the **Overview** section, select **Actions** > **Full View**. Click the line items document icon listed in the **Documents** tab or click the line items document dropdown in the **Documents** tab and select **Open**.

6. In the **Will this CLID contain only material line items?** popup, click **Yes**.

> Note
>
> You cannot reverse this choice later. So, if you plan to add lots or service line items to the CLID, click **No** in the popup.

Preparation of a Site for the Next Gen UI for CLID

This topic describes the steps you need to perform to enable seamless access to the next gen UI for CLID from the SAP Ariba Contracts site.

Prerequisites

- Your site must have the parameter **Enable new CLID interface for material items** (`Application.ACM.EnableNewCLIDInterface`) enabled. Contact SAP Ariba Support for assistance.
- You must be a member of one of the following user groups:
  - **Contract Administrator**
  - **Contract Project Administrator**

Running the Scheduled Task LineLevelERPTermsEnabler

To be able to access the next gen UI for CLID from your site, you must run the scheduled task **LineLevelERPTermsEnabler** using this procedure.

Context

The **LineLevelERPTermsEnabler** task adds the ERP terms that are header fields in the legacy UI to the line items as line-item terms. To run the scheduled task:

Procedure

1. From the **Administration** tab, navigate to **Site manager** in the left pane.

2. Click **Scheduled tasks**.
3. From the **Scheduled tasks** page, search for **LineLevelERPTermsEnabler**.
4. Click **Run** that corresponds to **LineLevelERPTermsEnabler**.

Migrating Contract Workspaces from Legacy UI to the Next Gen UI for CLID

Use this procedure to migrate existing contract workspaces that contain only material line items to the next gen UI for CLID. The migration task skips contract workspaces that contain lots or service line items.

Context

When you migrate contract workspaces that contain only material line items from the legacy UI to the next gen UI for CLID, ERP fields that are part of the header fields of the contract workspaces in the legacy UI are copied as line item terms in the next gen UI for CLID. If a workspace contains lots or service line items in the contract line item document, the workspace is not migrated to the next gen UI for CLID. You can continue to open such workspaces from the legacy UI. However, after you successfully migrate a workspace to the next gen UI for CLID, you cannot open the workspace from the legacy UI.

Procedure

1. From the **Administration** tab, navigate to the **Project Manager** section in the left pane.
2. Click **Migrate Existing S2C Contracts**.

   The **Migrate Existing S2C Contracts** page appears.
3. Select the check box corresponding to the realm name and click **Start Migration**.
4. In the **Confirm Migration** popup, click **OK** to initiate the migration task.
5. (Optional) Click the **Migration in Progress** tab to view the high-level status of the migration task.

   In the **Migration Progress** column, you can see the total number of workspaces, number of workspaces for which the migration is successfully completed, number of workspaces for which the migration is completed with errors, and the number of workspaces for which the migration is in progress.

   > Note
   >
   > The total number of workspaces shows only the number of workspaces that are eligible for migration; that is, workspaces that contain only material line items.

Viewing the Migration Status of Contract Workspaces

After you run the migration task for contracts from the legacy UI, you can use this procedure to view the migration status of the contract workspaces from the **View Migration Status of Contract Workspaces** page.

Context

After you **Migrate Existing S2C Contracts** to the next gen UI for CLID, you can view the status of contract workspaces that are identified for migration, successfully migrated, and migrated with errors.

Procedure

1. From the **Administration** tab, navigate to the **Project Manager** section in the left pane.
2. Click **View Migration Status of Contract Workspaces**.

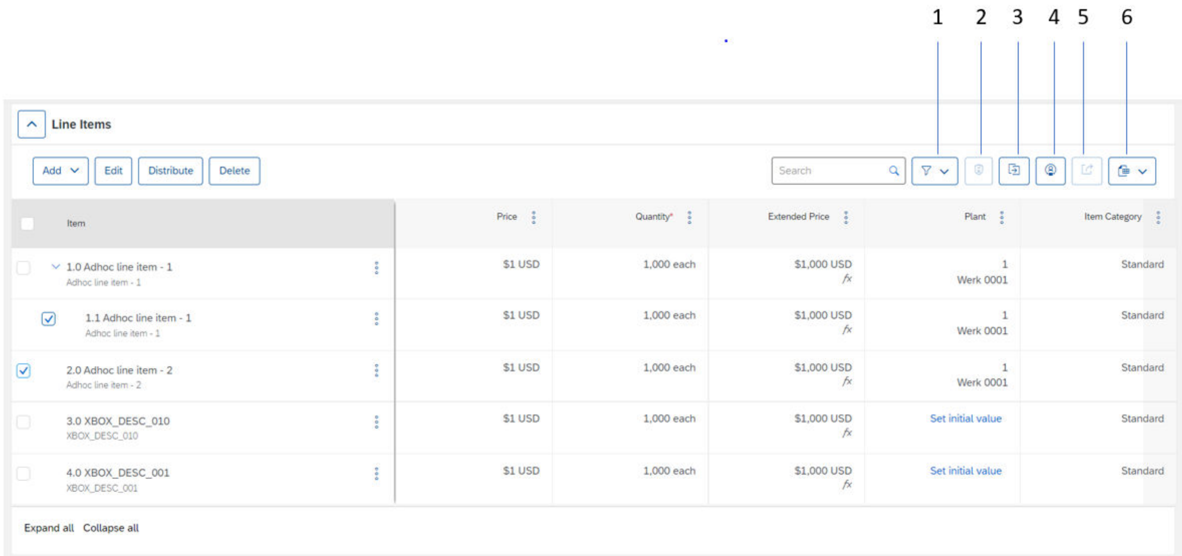
   The **View Migration Status of Contract Workspaces** page appears.
3. Navigate among the following tabs to view the corresponding status:
   - **Workspaces identified**–to view the list of workspaces identified for migration. Note that this list is cleared after the migration is completed.
   - **Workspaces completed**–to view the list of workspaces that have been successfully migrated.
   - **Failed workspaces**–to view the list of workspaces for which the migration failed becaue of errors.

Overview of the Next Gen UI for CLID

This feature introduces two main changes in the UI: a new, intuitive interface for managing line items and support for contracts-related information in the **For You** tab.

> ⚠ Caution
>
> This feature is decommissioned as of the Q1 2025 release. The documentation is no longer regularly updated. Existing customers can continue to use the feature until further notice. However, new customers must use the classic user interface, available by default, to manage CLIDs in SAP Ariba Contracts.

- The new CLID interface displays the following options



:

NXG UI Options	Callout Number	Description
Add dropdown	–	Select the dropdown to add new free-text line items or to add new line items from material master data. You can also add new terms to line items.
Edit	–	Select the **Edit** option to bulk edit the item terms.
Distribute	–	Select the **Distribute** to bulk distribute line items to different plants.
Delete	–	Select the **Delete** option to delete line items from the line items table in the next gen UI for CLID. **Note** If you delete an integrated line item, the item is grayed out and the **ERP Integration** status is shown as *Deactivated* until the item is sent to ERP again.
Search	–	Use the **Search** filter to search for specific line item information. The matching entries from the current page are highlighted. You can use the pagination controls to navigate through the pages and view matching entries.
Filter dropdown	1	Use the **Filter** dropdown to view only specific terms in the form of columns in the line items table.
Validate Line Items	2	Use the **Validate Line Items** icon to run a validation check for the line items to address any issues before saving or publishing the CLID.
Save Version	3	Use the **Save Version** icon to save the CLID and publish. When you click **Save Version**, it also triggers a validation of the line items in the CLID.
Bulk Edit Supplier	4	Select the **Bulk Edit Supplier** option to bulk edit the suppliers (contract manager has an option to change the supplier picked from the award).
Send items to ERP	5	Use the **Send items to ERP** option to integrate line items with an external system.

NXG UI Options	Callout Number	Description
Excel import/export dropdown	6	Select the dropdown to export or import line item information to or from an Excel file.
Pagination controls	–	By default, every page displays a maximum of 20 line items, incuding distributed items. The pagination controls at the bottom of the table contains **First**, *Last*, *Next*, and *Previous* and hyperlinked page numbers.

- The **Summary** section in the **For You** tab provides quick access to contracts in the following states:
  - Draft
  - Pending
  - Published
  - Expiring in next 60 days

  The **Recently viewed** section of the **For You** tab also lists contract documents that are among the four most-recentely viewed documents.

Management of Contract Line Items from the Next Gen UI for CLID

Creation of Contracts from Guided Sourcing Events

Buyers using SAP Ariba Sourcing with guided sourcing capability, can initiate creation of a contract directly from the **Award** page of SAP Ariba Sourcing. You can create a new contract or update an existing contract by selecting the awarded line items from the **Award** page of the guided sourcing event for which you want to create the contract.

> ⓘ Note
>
> You cannot add lots or service line items to a CLID configured to open in the next gen UI for CLID. If the award contains only material line items, you can select a contract that contains a CLID configured to open in the next gen UI for CLID.

For more information about creating and awarding guided sourcing events in SAP Ariba Sourcing, see Managing events with guided sourcing guide.

After you create an award, you can click the more icon (...) next to the name of the awarded supplier, and choose **Create a contract for awarded items**, **Add awarded items to an existing contract**, or **Add awarded items to an existing contract in New UI**.

The following information is copied from the event to the contract:

- Supplier name.
- Items from the award, added to a **Pricing Terms** document or contract line items document (CLID) in the **Documents** tab.
- Project owner (as the contract workspace owner).
- SAP Ariba Sourcing project name (as the predecessor project).
- Values for the **Regions**, **Commodity**, **Departments**, and **Contract Effective Date** fields in the sourcing event header are copied to the contract header fields.

When you create a contract workspace from a guided sourcing event, the associated guided sourcing event ID is displayed in the line items table of the next gen UI for CLID. The guided sourcing event ID is also displayed for line items integrated with ERP.

Creating a Contract for Awarded Line Items from the Guided Sourcing Interface [page 194]

Updating an Existing Contract with Awarded Line Items from the Guided Sourcing Interface [page 196]

Creating a Contract for Awarded Line Items from the Guided Sourcing Interface

Use this procedure to create a contract for awarded line items from the guided sourcing interface.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- Ensure to have created an award for the guided sourcing event in SAP Ariba Sourcing.

Context

You can create a contract in SAP Ariba Sourcing based on the award information. The line items from the award are copied to the new contract you create.

> ⓘ Note
>
> You cannot create a contract in the next gen UI for CLID from an event that contains lots, service line items, or more than 2000 line items (large line-item events).

Procedure

1. In the monitor page of SAP Ariba Sourcing, select the **Award** > **Award scenarios** > **Scenario Maker** tab.
2. Click the more icon (•••) that appears next to the name of the awarded supplier.
3. Select **Create a contract for awarded items**.

   The **Create Project** page appears.
4. Select **Create Contract Workspace (Procurement)** and enter the necessary information in the **Create Contract Workspace (Procurement)** page as described in How to create contract projects.

   After you create a contract workspace, the contract workspace page is displayed with the line items document in the **Documents** section. You can choose to edit the contract line items through the next gen UI for CLID if the contract contains only material line items.

   > Note
   >
   > If the event contains lots or service line items, the CLID opens in the legacy UI. The next gen UI for CLID does not support lots or service line items.

   To edit the contract line items through the next gen UI for CLID:

   > Note
   >
   > When you open a CLID that contains only material line items for the first time, a popup appears to confirm whether the CLID will contain only material line items. Click **Yes** if you want to open the CLID in the next gen UI for CLID. However, if you plan to add lots or service line items to the CLID, make sure that you click **No** to open the CLID in the legacy UI. After you make the choice by clicking **Yes** or **No**, you cannot change the choice.

   - Click the line items document icon listed in the **Documents** tab.
   - Click the line items document dropdown in the **Documents** tab and select **Open**.
   - In the **Contract Items** section, select **Actions** > **View and Edit Contract Items**.
   - In the **Overview** section, select **Actions** > **Full View**. Click the line items document icon listed in the **Documents** tab or click the line items document dropdown in the **Documents** tab and select **Open**.

Results

The contract line items appear in the new UI in the form of a table. You can edit or add new line items and terms.

Updating an Existing Contract with Awarded Line Items from the Guided Sourcing Interface

Use this procedure to update an existing contract with awarded line items from the guided sourcing interface.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- Ensure to have created an award for the guided sourcing event in SAP Ariba Sourcing. For more information, see Managing events with guided sourcing.

Context

You can update an existing contract in SAP Ariba Sourcing with the awarded line items of a guided sourcing event. The awarded line items are copied to an existing contract.

> ⓘ Note
>
> If the event contains lots, service line items, or more than 2000 line items, you are not allowed to choose a contract that contain a CLID configured to open in the next gen UI for CLID. To add line items from such events, you can only select contracts that have CLIDs that can be opened in the legacy interface.

Procedure

1. In the monitor page of the guided sourcing event, select the **Award** tab.
2. In the **Award** > **Award scenarios** > **Scenario Maker** tab, locate the awarded supplier and click the more icon (…) that appears next to the name of the awarded supplier.
3. Select one of the following options:
   - **Add awarded items to an existing contract**: Displays existing contracts in the legacy UI.
   - **Add awarded items to an existing contract in New UI**: Displays existing contracts in a new UI.
4. Complete the following steps based on the option you select:

Option	Procedure
Add awarded items to an existing contract	1. In the **Update or Replace existing Contracts** page, enter the **Contract Title** and click **Search**. The searched item will be listed in the **Available Contracts** section. Note If the event contains lots or service line items, only those contracts that are supported in the legacy UI are listed. You cannot choose contracts that contain material-only CLIDs and are configured to open in the next gen UI for CLID. 2. Choose the contract and click **Select This Contract**. The **Update or Replace?** popup window appears. 3. Select one of the following options: • **Replace existing contract**: Select the option to replace the existing line items of the selected contract with the new awarded line items • **Update existing contract**: Select the option to update the selected contract with the new awarded line items 4. Click **OK**.
Add awarded items to an existing contract in New UI	1. In the **Choose a Contract** page, select a contract and click **Next**. The Review items to be added page appears. It displays all the line items of the selected contract. 2. Review the line items and choose whether to add, update, or ignore the line items of the selected contract. Choose one of the following for each of the line items: • **Add**: Select **Add** when you want to add the line item to the selected contract. • **Update**: The **Update** option for line items appear when common line items exist between the selected contract and the awarded line items. Select **Update** when you want to overwrite the existing details of the line item with the line item details from the contract. • **Ignore**: Select **Ignore** when you do not want to add the line item to the selected contract. 3. Click **Done**.

Results

When you access the contracts line items document in the next gen UI for CLID, the newly added line items to the selected contract appears in the line items table.

Creation of Contracts from Classic Sourcing Events

You can create a contract with the awarded line items from classic sourcing events. You can also add awarded line items from classic sourcing events to an existing contract.

If SAP Ariba Sourcing is integrated with the next gen UI for CLID, you can add or update line items of the contract created in SAP Ariba Sourcing through the next gen UI for CLID.

When you open the line items document of the contract created from classic sourcing events, you'll be directed to the next gen UI for CLID. The next gen UI for CLID displays the line items of the contract in a line items table. You can add or edit line items in the line items table.

Creating New Contracts from Awarded Events [page 198]

Adding Awarded Events to Existing Contracts in the Next Gen UI for CLID [page 200]

Creating New Contracts from Awarded Events

Use this procedure to create new contracts from awarded events.

Prerequisites

- Your site has SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- You are a member of a group that has permission to create procurement contract workspaces, such as the **Contract Manager** group.
- If the sourcing event from which you want to create the contract is initiated by an RFQ from an external system and contains service outline attributes, ensure that you have enabled the following ICM parameter `Application.ACM.ExportOutlineAttributesFromSourcingToContract`. For information about managing ICM parameters, see Intelligent Configuration Manager Administration.

Context

The following information is copied from the event to the contract:

- Supplier name.
- Items from the award, added to a **Pricing Terms** document or contract line items document (CLID) in the **Documents** tab.

- Project owner (as the contract workspace owner).
- SAP Ariba Sourcing project name (as the predecessor project).
- Values for the **Regions**, **Commodity**, **Departments**, and **Contract Effective Date** fields in the sourcing event header are copied to the contract header fields.

> **Restriction**
>
> - Any attachments in the event are not copied to the contract workspace.
> - The contract workspace does not support the **Discount Percentage** term.

Procedure

1. On the **Award** tab, choose **Contract** > **Create New Contract**.
2. On the **Create New Contract** page, select the participant. This participant will be added to the contract header in the **Supplier** and **Affected Parties** fields.
3. Click **Create New Contract**.
4. Select the contract project type. To create a contract used to purchase items, select **Contract Workspace (Procurement)**. The **Create Contract Workspace (Procurement)** page opens.
5. Enter any additional values for the contract. Select a template and click **Create**.

   By default, **Documents** tab in the contract workspace contains a **Pricing Terms** Excel document that contains the items from the award.

   If your site has the optional contract line items document (CLID) feature, the items from the award are added to a document based on the selected contract template:
   - If the template contains a CLID, the items from the award are added to the CLID.
   - If the template contains a **Pricing Terms** Excel document, the items from the award are added to the **Pricing Terms** Excel document.
   - If the template doesn't contain a CLID or a **Pricing Terms** Excel document, SAP Ariba Contracts asks if you want the items from the award added to a CLID or a **Pricing Terms** Excel document.

Related Information

About Awarding Events
Awarding Events Using Event Optimization Scenarios
Adding Awarded Events to Existing Contracts

Adding Awarded Events to Existing Contracts in the Next Gen UI for CLID

Use this procedure to add awarded events to existing contracts in the next gen UI for CLID.

Prerequisites

- Your site must be enabled to use the next gen UI for CLID.
- You must be the event owner or have project owner capabilities for the event.
- Ensure to have created an award for a sourcing event in SAP Ariba Sourcing. For more information, see Event management guide.

Context

You can create a contract in SAP Ariba Sourcing based on the award information. The line items from the award are copied to the new contract you create.

Procedure

1. On the **Award** tab, choose **Contract** > **Add to Existing Contract**.
2. Select the supplier from the list of invited participants.
3. Click **Add to Existing Contract**.

   The **Choose a Contract** page appears. You can view contracts for the supplier you selected.
4. Select a contract and click **Next**.
5. Review the line items and choose whether to add or update the line items to the selected contract. Choose one of the following for each of the line items:
   - **Add**: Select **Add** when you want to add the line item to the selected contract.
   - **Update**: The **Update** option for line items appear when common line items exist between the selected contract and the awarded line items. Select **Update** when you want to overwrite the existing details of the line item with the line item details from the contract.
   - **Ignore**: Select **Ignore** when you do not want to add the line item to the selected contract.
6. Click **Done**.

Results

The **Contracts Workspace (Procurement)** page with the contracts line item document in the **Document** tab appears. You can edit the line items document through the Contract NXG UI.

Overview of Accessing the Next Gen UI for CLID

After creating a contract based on the award information in the legacy UI or guided sourcing UI, you can edit contract line items through the next gen UI for CLID. To access the next gen UI for CLID from the contract workspace page, you can use one of the following ways:

- Click the line items document icon listed in the **Documents** tab.
- Click the line items document dropdown in the **Documents** tab and select **Open**.
- In the **Contract Items** section, select **Actions** > **View and Edit Contract Items**.
- In the **Overview** section, select **Actions** > **Full View**. Click the line items document icon listed in the **Documents** tab or click the line items document dropdown in the **Documents** tab and select **Open**.

> Note
>
> When you open a CLID that contains only material line items for the first time, a popup appears to confirm whether the CLID will contain only material line items. Click **Yes** if you want to open the CLID in the next gen UI for CLID. However, if you plan to add lots or service line items to the CLID, make sure that you click **No** to open the CLID in the legacy UI. After you make the choice by clicking **Yes** or **No**, you cannot change the choice.

Adding Free-Text Line Items to a Contract from the Next Gen UI for CLID

Use this procedure to add free-text line items to a contract from the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Context

You can add free-text line items to a contract from the next gen UI for CLID. The next gen UI for CLID has the following options:

- *Save Version*
- *Validate Line Items*
- *Distribute* (to bulk distribute line items to different plants)
- *Bulk Edit Supplier* (contract manager has an option to change the supplier picked from the award)
- *Edit* (to bulk edit line items)
- *Send items to ERP*
- *Add* dropdown
- *Delete*

- *Search*
- *Filter* dropdown
- *Excel import/export* dropdown

Procedure

1. From the next gen UI for CLID, select ▶ **Add** ▶ **Item** ▶.
2. Enter the line item details such as name, description, quantity, price and so on.
3. Click **Add**.

Adding Line Items from Material Master to a Contract from the Next Gen UI For CLID

Use this procedure to add line items from material master to a contract from the next gen UI for CLID.

Prerequisites

- Your site must be enabled to use the next gen UI for CLID.
- Your site must be integrated with an external system such as SAP ERP. You must have imported material master data to your site from the external system.

Context

You can add line items from material master data from the next gen UI for CLID. The next gen UI for CLID has the following options:

- *Save Version*
- *Validate Line Items*
- *Distribute* (to bulk distribute to different plants)
- *Bulk Edit Supplier* (contract manager has an option to change the supplier picked from the award)
- *Edit* (to bulk edit line items)
- *Send items to ERP*
- *Add* dropdown
- *Delete*
- *Search*
- *Filter* dropdown
- *Excel import/export* dropdown

Procedure

1. From the next gen UI for CLID, select **Add** > **Item from material master**.
2. In the **Choose Materials** section, select the materials that you want to add.
3. Click **Done**.

Results

Selected line items from the material master data are added to the line items table in the next gen UI for CLID.

Line Item Editing from the Next Gen UI for CLID

You can edit the line items copied from an award to a contract in the next gen UI for CLID. You can edit the values of the line item terms directly in the line items table by using the edit icon or the clickable link to set the value. If the line items contain ERP Integration Fields, the ERP Integration Fields are displayed as terms in the line items table. You can set or edit the ERP Integration Field term values in the next gen UI for CLID.

Alternatively, you can choose to bulk edit term value for all the line items by selecting the **Edit** button in the next gen UI for CLID. If you choose to bulk edit, you cannot add new terms to line items from the **Mass edit** popup.

You can also choose to bulk edit supplier information for line items. You can add or edit supplier information for all line items by clicking **Bulk Edit Supplier** in the next gen UI for CLID.

Editing Line Items from the Next Gen UI for CLID [page 203]

Bulk Editing Line Items from the Next Gen UI for CLID [page 204]

Bulk Editing Suppliers in the Next Gen UI for CLID [page 205]

Editing Line Items from the Next Gen UI for CLID

Use this procedure to edit line items from the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Procedure

1. From the next gen UI for CLID, locate the line item that you want to edit.
2. To edit an item field or a term in a single item, click the field or term value. Fields or terms you can edit show an edit icon ( ) or a clickable link to set the initial value.

   A popup appears with the initial value and valid values. Enter the desired value.
3. Enter the value for the terms and click **Save**.

Bulk Editing Line Items from the Next Gen UI for CLID

Use this procedure to bulk edit line items from the next gen UI for CLID.

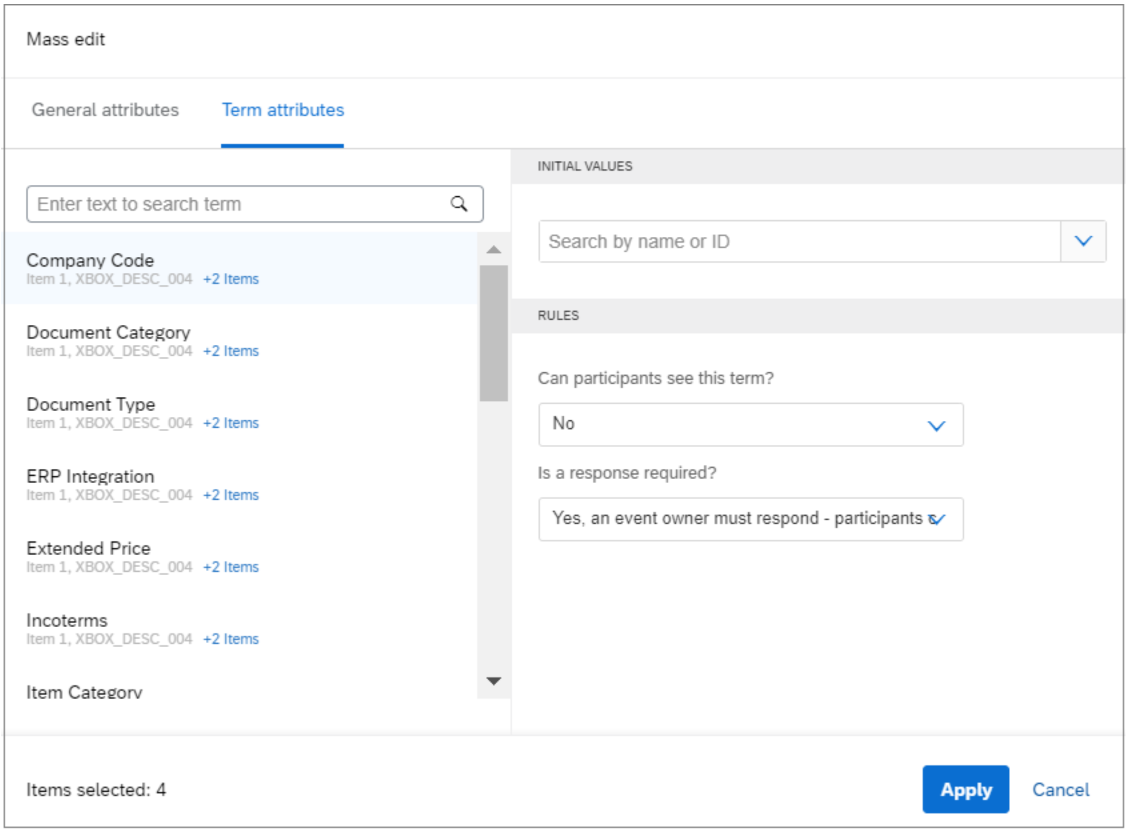
Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Procedure

1. From the next gen UI for CLID, select the line items that you want to edit or add value to multiple terms (bulk edit items).
2. Click *Edit*.

The **Mass edit** popup appears with the existing terms for the line items you selected:



On the left side of the popup, choose the term you want to edit. On the right side of the popup, set the value and rules for the term in all selected items. If the data type for the term is **Quantity**, you can also choose a different Unit of Measure (UoM) and apply only the changed UoM to all selected items and retain the other quantity and rule values.

> ⓘ Note
>
> You cannot add new terms when you bulk edit line items.

3. Enter the value for the terms and click **Apply**.

Bulk Editing Suppliers in the Next Gen UI for CLID

Use this procedure to bulk edit suppliers in the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Procedure

1. From the next gen UI for CLID, select the line items for which you want to bulk edit the supplier information.
2. Click *Bulk Edit Supplier*.
3. Select the supplier from the list.
4. Click **Done**.

Export of Line Items from the Next Gen UI for CLID

You can export line item details from the line items table in the next gen UI for CLID to an Excel spreadsheet.

If the line items contain ERP Integration Fields, then the exported Excel spreadsheet shows the ERP Integration Fields as terms. In case of distributed line items, the exported Excel spreadsheet shows the **Parent ID** column for the parent items and **Item Number** column for the child items. The **Item Number** is a unique system generated number and the **Parent ID** is used to depict the parent-child relationship. The **Parent ID** column for child items displays the item number of the associated parent item.

Exporting Line Items from the Next Gen UI for CLID [page 206]

Exporting Line Items from the Next Gen UI for CLID

Use this procedure to export line items from the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Context

You can download the line item details to a Microsoft Excel file from the next gen UI for CLID.

Procedure

1. From the next gen UI for CLID, click *Excel import/export*.
2. Select **Export items**.

Results

The line item details are downloaded to an Excel file. You can view the line item details in the **Line items** spreadsheet.

Import of Line Items to the Next Gen UI for CLID

You can import line item details from an Excel spreadsheet to the line items table in the next gen UI for CLID. You can add new line items, update existing line items, or replace the entire list of line items in the line items table.

If the line item details contain ERP Integration Fields, you can update the associated term values in the Excel spreadsheet. You can also import distributed line items from an Excel spreadsheet.

> ⓘ Note
>
> - You can only import files of .xls and .xlsx format.
> - The maximum number of line items that you can import to the next gen UI for CLID through an Excel spreadsheet is 2000.

The next gen UI for CLID validates each of the line item details in the Excel spreadsheet. If the validation is successful, the line items within the file will be imported. If the validation of any of the line item details fail, then only the errorneous line item will not be imported to the next gen UI for CLID from the Excel spreadsheet.

When the import is successful, the following message is displayed:

```
Import successful
```

When the import fails, an error about the failure with a link, **See Details** appear. You can access the link for information about the import failure. The link shows the list of errors associated with the line items. You can fix the errors and try importing line items from the Excel spreadsheet again.

You can also import distributed line items from an Excel spreadsheet. If you are adding a new parent item, you must ensure to use a unique number for the **Item Number** field and the **Parent ID** field can be null. If you are adding a new child item, you must ensure to use a unique number for the **Item Number** field and the **Parent ID** field must contain the item number of the parent item.

Limitations

Following limitations apply when you import line items from an Excel file to the next gen UI for CLID:

- The line items from the Excel file will not be imported in the following instances:
  - If the **Parent ID** of the distributed line item is incorrect. You must provide a valid **Parent ID** for a distributed line item in the Excel file.
  - If the **Parent ID** and **Item ID** of the distributed line items (added from material master data) is incorrect.
  - If the Excel file contains line items more than 2000, then the additional line items will not be imported.
- You cannot import multi-level hirerarchy of line items from the Excel file.

- You cannot import a line item if you've changed a parent item to a child item.
- You cannot import a line item if you've changed a child item to a parent item.

Importing Line Items to a Contract from the Next Gen UI for CLID [page 208]

Importing Line Items to a Contract from the Next Gen UI for CLID

Use this procedure to import line items to a contract from the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Context

You can import line items from an Excel spreadsheet to the next gen UI for CLID. This topic assumes that you already have exported the Excel template and edited the Line Items worksheet with the new line item information.

Procedure

1. From the next gen UI for CLID, click *Excel import/export*.
2. Select **Import items**.
3. In the **Select Import method and upload file** popup, select one of the following option:
    - **Add to or Update the document**: Select the option to update the line items table in the Contract NXG UI with the new line items from the Excel file.
    - **Replace the document**: Select the option to replace the existing line items in the line items table of the next gen UI for CLID with the line items from the Excel file.
4. Upload the Excel file which contains the line items details.You can drag and drop the Excel file to the Drag a file here or browse to upload section or browse to select and upload the file.
    - Drag and drop the Excel file to the **Drag a file here or browse to upload** section.
    - Click the **browse** link to browse to the file location, select and upload the file.
5. Click **Import**.

Results

The line items from the Excel will be copied to the line Items table in the next gen UI for CLID.

Deleting Line Items from the Next Gen UI for CLID

Use this procedure to delete line items from the next gen UI for CLID.

Prerequisites

Your site must be enabled to use the next gen UI for CLID.

Context

You can delete line items of a CLID document from the next gen UI for CLID.

> ⓘ Note
>
> If you've deleted an integrated line item, the item is grayed out and the **ERP Integration** of the item is shown as *Deactivated* until the item is sent to ERP again. For more information, see Integration of Contract Line Items with External Systems [page 210].

Procedure

1. Select the line items that you want to delete from the line items table.
2. Click *Delete*.

Line Item Validation

Line item validation helps you identify errors or omissions in the line item data and fix those issues before publishing a CLID or contract workspace.

Validation of the line item content occurs either when a user click the **Validate Line Items** button, the **Save version** button to save and publish the CLID, or clicks the **Send to ERP button** to initiate ERP integration of the line items.

During validation, the error messages are displayed first. When the validation process detects 50 errors, those are displayed to give the users a chance to fix the errors before proceeding with the validation further. After the errors are corrected, you can initiate the validation again, and if there are more errors, the errors are displayed in batches of 50. After all the errors are fixed, the validation process displays the warning messages.

If there are more than 20 line items and if an error or warning message is related to a line item in a page that is not currently displayed, the corresponding page is displayed and the field in the line item which caused the error or warning is highlighted.

During user-triggered line item validation, the validation errors are marked as warnings and displayed in a sequential order. Users can fix the errors or click the **Ignore and save** button to defer the corrections for later.

However, if the issues are not fixed before the CLID is saved or the contract workspace is published, the warnings are flagged as errors and the selected operation, such as save or publish, fails. If the errors appeared while publishing a contract workspace, you need to create a new version of the workspace and fix the errors.

The following table describes some of the common validation errors and the corresponding error messages.

Error or Warning Message	Validation Error
Item {0} : Material Number {1} and Plant Id {2} are not associated.	The material ID and the plant ID in the line item are not associated with each other.
Product Category is empty	The product category field does not contain a value.
Purchasing Organization Code {0} does not match with Company Code {1}	The purchasing organization value does not map to the company code.
Purchasing Group is empty	The **Purchasing Group** field does not contain a value.
Purchasing Organization is empty	The **Purchasing Organization** field does not contain a value.
Item {0} : Quantity is empty	The **Quantity** field does not contain a value.
Item {0} : Price is empty	The **Price** field does not contain a value.
Item {0} : Item doesn't belong to External System set in workspace	The material does not belong to the external system specified in the workspace.
Item {0} : Item does not belong to supported category	The material does not belong to a supported category.
Company Code is empty	The **Company code** field does not contain a value.
Item {0} : Material group is required	The **Material group** field does not contain a value.
Supplier Required	The **Supplier** field does not contain a value.
Item {0} : External System Id is empty or is not associated with header level external System	The **External System Id** field does not contain a value or contains a value that is not associated with the external system specified in the header.
Item {0} : Product Type is not associated with Item Category	The product type of the line item is not associated with the specified item category.
Item {0} : Item title length is more than permitted length for ERP integration	The number of characters in the item title exceeds the string length supported for ERP integration.

Integration of Contract Line Items with External Systems

You can integrate contract line items with an ERP system by using the **Send items to ERP** option in the next gen UI for CLID. If your contract workspace is configured to use an external system, then a new column, **ERP Integration**, is displayed in the line items table. The **ERP Integration** column displays the current status of integration for each line item.

Different statuses displayed for line items in the **ERP Integration** column are:

Status	Description
In Process	The status of the line item displays **In Process** when the line item is sent to the ERP system by using the **Send items to ERP** option in the next gen UI for CLID. It also displays the elapsed time stamp in minutes. If the integration fails at ERP, then the line item status remains in the **In Process** status for a long duration; based on the elapsed time, user can choose to resend the line item to ERP or check with the site administrator for the possible reasons of failure at Ariba Network and fix the issue.
Yes	The status of the line item displays **Yes** when the line item has successfully been integrated with the ERP system.
No	The status of the line item integration displays **No** if: • the line item is not sent to ERP • the line item is sent to ERP, but the integration failed connecting to Ariba Network
Modified	The status of the line item integration displays **Modified**, if: • you edit the integrated line item • you delete an integrated line item before sending it to ERP • you edit the integrated line item in an Excel and then import the file
Deactivated	The status of the line item displays **Deactivated** if you deleted an integrated line item and did not send it to ERP again. In such cases, the line item appears grayed out in the line items table. You cannot edit or delete the line item.
Blank	The status of the line item displays blank if the line item is not processed for integration. For example, in case of distributed line item, the **ERP Integration** status column appears blank for the parent line item, as it is not processed for integration. Instead, the status is displayed for the child line items.

> ⓘ Note
>
> The **ERP Integration** status column is displayed only in the next gen UI for CLID and does not appear as a term when you export the line items to an Excel.

You can edit the line item term values in the line items table of the next gen UI for CLID or you can edit the values in an Excel file and then import the file. When you import line items from an Excel file, all line items, including any unmodified line items, are updated with the information from the Excel file. The integration status for all line items are marked as **Modified** in the next gen UI for CLID . You can choose to remove the line items from the Excel file which do not have any updates.

> ⓘ Note
>
> - If you've configured your contract workspace with an external ERP system, then the associated ERP Integration Fields are displayed as terms in the form of columns, in the line items table. You can edit the value of these ERP Integration Fields.
> - If the line items are already integrated with an ERP system, then you cannot edit the associated ERP Integration Fields displayed as terms in the line items table. These line items are grayed out. You cannot delete line items that are already integrated with an ERP system.

When you integrate the contract line items with an external system by using the **Send items to ERP** button in the next gen UI for CLID, the suppliers added for the contract line items must meet the supplier qualification criteria as specified in the contract workspace template. For more information, see Specification of Supplier Qualification Criteria [page 212].

Specification of Supplier Qualification Criteria

After a supplier is registered, a qualification manager can start qualifying the supplier for one or more specific combinations of commodities, regions, and (optionally) departments by starting qualification projects and sending qualification questionnaires. Approvers review the supplier's answers and approve or deny the qualifications. Supplier qualification questionnaires typically solicit detailed information from the supplier that is specific to the qualification's commodities and regions. For more information about specifying the supplier qualification criteria for contract line items in the contract workspace template, see Qualification Management Using Supplier Qualification and Disqualification Projects in Managing Suppliers and Supplier Lifecycles.

You can configure supplier qualification criterias for contract line items in the contract workspace template. Contract workspace templates can specify that suppliers must have specific qualification statuses for the contract's commodities and regions. You can select from the various list of statuses for the **Eligible supplier statuses for contract integration with ERP** criteria in the **Advanced Options** tab of the contract workspace template. Some of the qualification statuses you can select for the **Eligible supplier statuses for contract integration with ERP** criteria are Not Invited, Registered, Qualified, Pending Qualification Approval, and so on.

When you integrate contract line items with an external system by using the **Send items to ERP** button in the next gen UI for CLID, the suppliers added to the contract line items should meet the supplier qualification criteria as specified in the contract workspace template. If the suppliers added to the contract line items do not meet the supplier qualification criteria, then an error message will be displayed in the user interface and the contract line items document will not be sent to the external system. The error message lists the contract line items that do not meet the supplier qualification criteria.

Sending Contract Line Items to an External System

Use this procedure to send contract line items to an external system.

Prerequisites

Your site must be configured to use an external system, such as an SAP ERP system, as described in Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.

Context

You can select line items from a line items table in the next gen UI for CLID and send the items to an external system.

Procedure

1. In the next gen UI for CLID, open the CLID that contains the line items that you want to send to the external system. For more information about accessing the next gen UI for CLID, see Overview of Accessing the Next Gen UI for CLID [page 201].
2. From the line items table, select the line items that you want to send to the ERP system.
3. Click *Send items to ERP*.

Management of Distribution of Contract Line Items

Distribution of Contract Line Items

The next gen UI for CLID provides the line-item distribution capability that enables you to create multiple outline agreements for a line item in the integrated ERP system.

A sourcing event might involve sourcing for one or more line items that are required at various plants in the buyer organization. Sometimes, the plants belong to different purchasing organizations within the company and are geographically distributed. Similarly, a supplier may be fulfilling an order through its various branches or subsidiaries located in different regions. These scenarios might involve differences in one or more of the following splitting conditions:

- PORG or purchasing organization
- PGROUP or purchasing group
- Company code
- Payment terms
- Document type
- Document category
- Supplier

You can use the distribution options to create the separate outline agreements or scheduling agreements, in the integrated ERP system, based on any of the splitting criteria. You can either do a distribution at a line-item level or do a bulk distribution for multiple line items.

After you create a line item for distribution, you can edit the line item to add the required information. For more information on editing a line item, see Line Item Editing from the Next Gen UI for CLID [page 203].

You can add quantity required for each plant and that information is included in the corresponding outline agreement. Header information, such as effective date and expiry date, are copied to the outline agreements from the contract workspace header.

Support for material hierarchy in the next gen UI for CLID enables you to select a variant of the material from the material hierarchy information that is integrated from the material master data.

Support for supplier hierarchy in the next gen UI for CLID enables you to select a supplier entity that belongs to the main supplier to which an item was awarded.

Plants and Purchasing Organizations

You can view the list of plants available in a selected region and based on the plant that you select, SAP Ariba Contracts runs a master data lookup to identify the associated purchasing organization (PORG).

Quantity

You can specify the quantity of a line item to be supplied to each plant. You can also modify the quantity information after you complete the distribution for a line item. If there is a change in the total quantity, you must first update the line item quantity and then make the corresponding updates at the distribution level. If you enter a quantity that is less than the quantity specified at the line item, that discrepancy might cause errors when you integrate the modified outline agreement with the ERP system.

Payment Terms

You can use payment terms as a splitting criterion for distribution. Line items inherit the payment terms specified at the header level. However, you can override the header-level values by updating the payment terms at line-item level.

Supplier Currency

You can specify different supplier currencies for a line item and its child items. Supplier currency is a splitting criterion for distribution.

Supplier Hierarchy

You can view all child entities – branches or subsidiaries – associated with the main supplier in whose favor the award was made and select any of the child entities for creating distribution.

Material Hierarchy

You can create distribution for the parent item or any of the child items in the material hierarchy.

Creating Distribution for a Line Item

Distribution enables you to create multiple outline agreements, from a CLID, in the integrated ERP system. Use this procedure to create distribution at the line-item level.

Context

To create distribution for a line item in a CLID:

Procedure

1. From the contract workspace that contains the line items for which you want to create distribution, open the CLID.
2. From the **Line Items** section, click the *Actions* icon next to the item for which you want to create the distribution.

3. Click **Distribute**.

   A new child item is added to the line item for which you created the distribution.

Next Steps

Edit the newly-added item to specify details such as plant, quantity, price and so on. If the quantity you specify is lesser than the quantity specified for the parent item, SAP Ariba Contracts flags an error when you save the CLID. Similarly, all line items are validated when you save the CLID and the save operation is not completed until the errors are addressed. Alternatively, you can click the **Validate Line Items** option to run line item validation and fix any errors the validation identifies in the line items.

After you publish the contract with the newly-created distribution, you can click the **Send to ERP** button to create the corresponding outline agreements in the integrated ERP system.

Creating Bulk Distribution for Line Items from the Next Gen UI for CLID

Use this procedure to create bulk distribution for line items from the next gen UI for CLID. Distribution enables you to create multiple outline agreements, from a CLID, in the integrated ERP system. The bulk distribution option enables you to create distribution of line items for more than one plant. You can also do a select-all to create distribution for all the line items present in the CLID to multiple plants.

Context

To create bulk distribution for line items in a CLID:

Procedure

1. From the contract workspace that contains the line items for which you want to create distribution, open the CLID.
2. From the **Line Items** section, select the line items for which you want to create distribution. Alternatively, you can select the check box next to **Item** to select all line items.
3. Click the *Distribute* button.

   The *plant selector* popup appears.
4. Select one or more plants based on which you want to create the outline agreements for the selected line items and click **Choose**.

   For each of the selected line items, a new sub entries are created for distribution.

Next Steps

Edit the newly-added item to specify details such as plant, quantity, price and so on. If the quantity you specify is lesser than the quantity specified for the parent item, SAP Ariba Contracts flags an error when you save the CLID. Similarly, all line items are validated when you save the CLID and the save operation is not completed until the errors are addressed. Alternatively, you can click the **Validate Line Items** option to run line item validation and fix any errors the validation identifies in the line items.

After you publish the contract with the newly-created distribution, you can click the **Send to ERP** button to create the corresponding outline agreements in the integrated ERP system.

Simplified Excel Import of Line Items

This topic describes the simplified Excel import of line items feature.

This feature enables you to quickly add line items, including material master line items and service line items, to contract workspaces in SAP Ariba Contracts from a Microsoft Excel document. You can specify term values for line items, such as quantity and price. You can also specify values for custom terms.

This feature provides a new Simplified Excel Import operation that allows users to add, update, or replace all the line items with the contents from an Excel file. The Simplified Excel Import operation includes a step to export a template with the current contents of your event. The template contains a worksheet called **LineItems**, which contains:

- A header row in blue.
- Columns that define the items and specify values for the item terms, including material master item IDs (ItemID).
- Help text rows in yellow with descriptions and valid values for the columns. Click the plus sign (+) on the far left to expand the contents.
- A row for each item in the event.

> ⓘ Note
>
> If you have enabled the rules related to pricing conditions in the contract workspace template, then another worksheet **Pricing Conditions** is included in the Excel template.

The Excel template also contains a Design Instructions worksheet with instructions.

Overriding the Read-Only Terms in Contract Line Item Documents using Simplified Excel Import

Use this procedure to override the read-only terms in Contract Line Item Documents

Prerequisites

- Enable the parameters `Application.ACM.ReadOnlyTermsforExternalSystemLineItemDefinition` and `Application.AQS.EnableTermDefaultValueCopy`.
- Enable **SC-11096: Support read-only terms in the line-item definition in external system templates (contract line-item template)** and **UP-5036: Read-only item Attribute** features from the **Feature Manager**.

Context

If your site is integrated with an external ERP system, you can mark the line-item term definitions as read-only terms when creating a sourcing template or contracts template (contract line-item template or contract workspace template) for external systems. You can also override the read-only terms for the line-item definition while creating or editing the contract against an award created from a sourcing event.

When you create a new contract or edit an existing contract from a sourcing award, you can override the read-only terms in the contract templates, making the terms editable.

Procedure

1. Create a **Contract Line Item Document Template**. While defining or editing a term for **Material Number**, select **Make this term as read-only? to Yes** and set **Read-only term applicability** to **Both**, and then click Publish. For more information, see Modifying a Contract Line Items Document (CLID) Template.
2. Create an **event** using the previously created template and award the supplier. For more information, see Creating Sourcing Events from Sourcing Requests [page 32].
3. From the **award** tab, create a contract workspace in CLID. For more information, see Creating Contract Workspaces from Procurement Workspaces [page 18].
4. In CLID, ensure the default value is set for read-only terms.
5. Select **Simplified Excel Report**.
6. Select **Click here to open Contract Line Items Document in an Excel Spreadsheet** and download the Excel.
7. Edit the **Material Number** and **save** the Excel.
8. Select **Choose File**, choose the modified Excel, and select **Done**.

Design Instructions Worksheet Information

The **Design Instructions** worksheet contains instructions on how to use the embedded help in the **Line items** worksheet and what values to specify for the special columns and as the initial values for the terms. When a line items document is exported, the values are provided for information only. SAP Ariba does not import values from this worksheet.

Line Items Worksheet Columns for Contract Line Items with Default Terms

Column	Description
Item Number	Used by SAP Ariba to correlate an item with attributes in the **Item Attributes** worksheet and to identify an item.
Type	Item type. For example: Line Item.
Item Name	Item name. For example: Test.
Description	Item description.
Commodity	Commodity code of the item. If the value is numeric, add a single-quote (') before the value. For example, if the commodity code is 18, provide `'18`.
Price	Price per unit.
Quantity	Quantity of the item.
UoM.Quantity	Unit of measure for the unit price.

Line Items Worksheet Columns for Contract Line Items with Material Master Terms

Column	Description
Item Number	Used by SAP Ariba to correlate an item with attributes in the **Item Attributes** worksheet and to identify an item.
Type	Item type. For example: Line Item.
Item Name	Item name. For example: Test.
Description	Item description.

Column	Description
Commodity	Commodity code of the item. If the value is numeric, add a single-quote (') before the value. For example, if the commodity code is 18, provide `'18`.
ItemID	Specify the material number. This column should be filled only for material master line items. For example: `X914128-010`.
ERPSystemID	Specify the ERP System ID to which this event is integrated. For example: ERP-Test. If you want to use a material masetr line item or convert a line item to a material master line item, then you must provide the ERP System ID. If the external system is not provided in the Excel file but is provided in the contract workspace, then the ID will be used from contract workspace if the ERP System ID is set at the event level. In this case, this field can be left blank.
Price	Price per unit.
Quantity	Quantity of the item.
UoM.Quantity	Unit of measure for the unit price.

Items Added from SAP Item Master Data

Items added from SAP item master data have entries with the following **Attribute Name** values:

Attribute Name Column Value	Description
Plant	ERP IDs of plants that may purchase this item. IDs are delimited by a comma and space. If the value is numeric, add a single-quote (') before the value. For example, if the ID is 10000, provide `'10000`.
Item Category	Category to which the material belongs.
Material Group	Name of the material group for the item.
Incoterms	International Commercial Terms ID that specifies Terms of Delivery.
Material Code	Material code for the item.
Requisition ID	ID of the ERP requisition for the item.
RFQ ID	ID of the ERP RFQ for the item.

Attribute Name Column Value	Description
Requisition Item Number	Line number for this item in the ERP requisition.
RFQ Item Number	Line number for this item in the ERP RFQ.
Material Number	Number (ID) of the material group for the item.
Material Type	Material type for the item.

Line Items Worksheet Columns for Service Line Items

To import service line items, the data must be prepared according to the service hierarchy. For more information about service hierarchies, refer to Event Service Items and Service Hierarchies.

Column	Description
Item Number	Used by SAP Ariba to correlate an item with attributes in the **Item Attributes** worksheet and to identify an item.
Type	Item type. For example: Service Line, Service Outline, or Service Specification.
Item Name	Item name. For example: Test.
Description	Item description.

Number	A numeric value to define the hierarchy of the service line items.
	
	Example
	
	For a service item A, the hierarchy can be as follows:
	
	Item Name / Item Type / Number:
	`Service Item A` / `Service Line` / `1`
	`Service Outline A` / `Service Outline` / `1.1`
	`Service Specification A` / `Service Specification` / `1.1.1`
	`Service Specification B` / `Service Specification` / `1.1.2`

Column	Description
Commodity	Commodity code of the item. If the value is numeric, add a single-quote (') before the value. For example, if the commodity code is 18, provide `'18`.
Price	Price per unit.
Quantity	Quantity of the item.
UoM.Quantity	Unit of measure for the unit price.

Pricing Conditions Worksheet Column

This worksheet is available only when the pricing condition-related rules are enabled in the corresponding contract workspace template. You can include pricing conditions for items of type **Service Specification** and items added from SAP Item Master Data only.

Column	Description
Item Number	Specifies the item number assigned to the **Service Specification** item or the SAP Item Master Data item.
Item Name	Specifies the name of the item.
Pricing Condition Rule	Specifies the pricing condition rule.
Max Volume Allowed for Supplier	Specifies the volume amount that suppliers must not exceed when submitting their responses.
Validity Period Start Date	Specifies the date on which the validity of the pricing conditions begin.
Validity Period End Date	Specifies the date on which the validity of the pricing conditions end.
Period Quantity	Specifies the period quantity of the pricing conditions.
Volume	Specifies the volume tier for which you want to collect pricing information.
Term	Specifies the term of the item for which you want to collect pricing information. Example: Price
Term Type	Specifies the term type of the pricing condition term. For example: Money

Column	Description
Value	Specifies the price value with currency type. For example: $25.00 USD

Creating Contract Line Items Documents (CLIDs)

Use this procedure to create contract line items documents.

Prerequisites

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration.

Contract line items documents can be created in SAP Ariba Contracts procurement contract workspaces only.

Context

> ⚠ Limitations
>
> You cannot use the user interface to search for and add item master data directly to a large-capacity contract line items documents. You can search for and add the items to a standard-capacity contract line items document and export the contents to Excel. Then, add the Excel rows with item master data to an Excel file for the large-capacity contract line items document.

Procedure

1. Use one of the following methods to create a line items document:
   - To create a line items document in a workspace that does not contain a pricing terms Excel document (an Excel document with the **Use As** field set to **Contract Content**), navigate to the **Documents** tab and choose **Actions** > **Create** > **Line Items Document**.
   - To create a line items document from a pricing terms Excel document, click the name of the pricing terms Excel document and choose **Action** > **Create Line Items Document**.
     If the pricing terms Excel document has an associated task (such as a review task) that has not started, creating a line items document from the pricing terms will cancel the task. A page opens with the following message: **Creating a line items document will cancel tasks for the pricing terms document that have not started. Continue?** Click **OK**.
2. Specify a **Title** for the document.

3. In the **Description** field, add a description for the document.
4. In the **Base Language** pull-down menu, specify the base language for the document. SAP Ariba uses the base language to display the document to users whose interface language (set in their preferences) is set to a language for which the document has no translated text. For example, a document has the base language English with translations for French and Japanese. If a German user tries to view the document, SAP Ariba displays the English version because the document has no German translation and the base language is English.

   > ⓘ Note
   >
   > If English is the default locale for your SAP Ariba site and a translation is available in English and the template base language but not in the user's preferred language, then the content appears in English.

5. Select a value for **Capacity type**. **Standard**-capacity line items documents can contain up to 2000 line items. **Large**-capacity line items documents can contain up to 10,000 line items. Users must create, view, and modify items for large-capacity line items documents using Microsoft Excel files.
6. For the **Is Publish Required** selection buttons, select **Yes** if you want to require the document to be published before the contract workspace can be published.
7. For the **Exchange Rate Set** pull-down menu, select the exchange rate that must be used for currency conversion whenever the currency for a line item is edited.

Results

If you create a line items document from a pricing terms Excel document, the pricing terms Excel document changes as follows:

- the value of the **Use As** field changes from **Contract Content** to **None**
- it is no longer processed as a pricing terms Excel document; data from the document is not propagated to compliance contracts, follow-on sourcing projects, or external systems.

Next Steps

Add items to the document as described in Adding Items to Standard-Capacity Contract Line Items Documents [page 229] or Adding Items to Large-Capacity Contract Line Items Documents [page 241].

Adding Line Items to CLID

Use this procedure to add line items to CLID.

Prerequisites

You must first create the **Contract Workspace (Procurement)** page and configure the header-level information for the contract document.

> ⓘ Note
>
> Because the external system that you have selected is configured as a central procurement hub for configuring the header-level information, you can specify the values for the **Company Code** and the **Purchase Group** fields only.

Context

After you configure the header-level information for the contract document, you can create a CLID document and add line items to it. You can add the line items as follows:

- Based on the master data in an external system connected to the central procurement hub.
- Ad hoc line item

Procedure

1. In the **Documents** section of the contract workspace page, click **Actions** > **Line Items Document**.
2. In the **Create Line Items Document** page, do the following and click **Create**:
    - In the **Title** field, enter the name of the CLID.
    - In the **Description** field, enter a meaningful description for CLID.

    The CLID document with the name that you have specified is created.
3. To add the line item based on the master data in an external system connected to the central procurement hub, do the following:
    a. Click **Add** > **Items From Item Master Data**

    The **Add Content From Item Master Data** page appears.

    > ⓘ Note
    >
    > Adding one or more items from the Item Master Data inside another item might cause data loss or discrepancy during external system integration. To avoid this, add the item from Item Master as an independent item.

b. In the **Search Filter** section, in the **External System** field, choose the external system for the line item, and click **Search**.

> ⓘ Note
>
> Because the external system selected at a header level is configured as the central procurement hub, the **External System** drop-down list displays the external systems linked to the central procurement hub. The system that is configured as the central procurement hub also appears on this drop-down list. If this system is configured only as the central procurement hub, the **Search Results** section will not display any materials. If this system is configured both as the central procurement hub and as the external system, the **Search Results** section lists the materials.

The **Search Results** section lists the materials available in the external system that you have selected.

c. Select the items that you want to add to CLID and click **Copy**.

The items that you have copied appear in the **All Content** section of CLID.

4. To add an ad hoc line item, do the following:

a. Click **Add** > **Item**

The **Add Item** page appears.

b. Enter the details of the ad hoc line item (**Name**, **Commodity** (commodity code), and **Quantity** are mandatory fields where you must specify values) and click **Done**.

The item that you have added appear in the **All Content** section of CLID.

c. In the **External System ID** field, choose the external system for the ad hoc line item. This external system is an ERP system that you have linked to the central procurement hub.

d. Choose the value for the master data fields such as **Plant**, **Item Category**, **Material Group**, and so on. The values displayed for these fields are based on the master data from the external system that you have selected at the line item level.

e. Click **Done**.

5. To add a line item inside a master data line item or an ad hoc line item, do the following:

a. Set the value of the parameter `Application.ACM.ContractLineItemsDocument.EnableAddItemInsideAnItem` to **Yes**.

b. Select the line item on the CLID and click **Add** > **Item** .

The **Add Item** page appears.

c. Choose **Add Inside**.

> ⓘ Note
>
> Adding items inside an item might cause data loss or discrepancy during external system integration.

d. Add other required details and then click **Done**.

6. Click **Save as Draft** on the CLID.

Importing a Simplified Excel Version of Contract Line Items

Use this procedure to import a simplified Excel version of contract line items.

Context

You edit contract line items documents using Excel files in the following cases:

- The line items document is a large-capacity line items document.
- You choose to import the contents of a standard-capacity line items document from an Excel file.
- You were asked to review a line items document and are an external reviewer (you do not have an SAP Ariba Contracts user account), or an internal reviewer who does not have edit access. External reviewers receive an Excel version of the line items document. Both external reviewers and internal reviewers who do not have edit access can submit an Excel version of the line items document with changes.

> ⓘ Note
>
> Be careful when modifying terms for material master items. Modified values can cause validation errors.

The simplified Excel format for contract line items documents with material master contains the following worksheets:

- **Design Instructions**
- **Line items**

All cells in the worksheets are general format cells.

Procedure

1. Open the Contract Line Items Document (CLID) that you want to add to, update, or replace in your contract workspace. (If the **Simplified Excel Import** button is not visible, click **Actions** > **Edit Content**.)
2. Click **Simplified Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
3. In Step 1 of the **Import Content from Excel** page, click **Click here to import Contract Line Items Document in an Excel Spreadsheet.**.
4. When the download completes, choose to either open the template in Microsoft Excel or save it, then open it. Add or edit rows for the content.

    > ⓘ Note
    >
    > - Do not remove the blue header row.
    > - Any existing content in the event will be deleted and replaced by the contents of the Excel document. If you already had items in your event that you want to retain, do not remove the entries for these items. If you choose the Add to document option, then the existing content will be updated.
    > - By default, all terms are applied to all line items. If you do not want to include a term for a line item, enter `N/A` in the corresponding cell.

- When adding entries for material master items:
  - Enter the material master ID in the **ItemID** column.
  - You can leave the **ERPSystemID** cell empty if the **External System** is set in the event header; SAP Ariba will use the **External System** from the event header.
  - When you import the worksheet, SAP Ariba overwrites the **Name**, **Description** and any term values in the worksheet with values from the material master data.

5. Save your changes.
6. In Step 3, choose **Add to document** to add content to add all the new line items and update the existing line items (if there are changes to them). No line items in the existing document are deleted.
7. Alternatively, in Step 3, choose **Replace document** to delete the existing line items and replace them with the line items from the Excel document.
8. In Step 4, click **Choose File** and locate the file from your computer.
9. In Step 5, click **Import** Wait for the import to complete.
10. Check for errors or warnings, correct any errors in the Excel document, and repeat the import operation.

    Error messages indicate that no data was imported and the contents of the event are not changed. Correct the errors in the Excel document and repeat the import operation.

    Several validations are applied during the import operation. The following errors must be fixed:
    - Sheet Name must be correct. It must be "Line items".
    - All rows must have the Item Name column populated. If the Item Id column is populated, then check whether Item Name is skipped, as it is not mandatory for the user to enter the item name for MM line items.
    - The Type column must contain only "Line Item".
    - The total number of items: <number of line items>, exceeds the maximum allowed for the contract line items: 2,000

    The message **The Excel file has been successfully imported with warnings. View details** indicates that the import operation was able to add some or all items, but perhaps not all term values. Click **View details** to see which line items or terms had errors. For example, there may be warnings if the user provides an incorrect value for a term, or an incorrect ItemId or UOM value.

    You can correct the errors in the Excel document and repeat the import operation, or manually add the values in the user interface.

    If the import operation doesn’t result in any warnings, a message is displayed to indicate that the Excel document was successfully uploaded.

Adding Items to Standard-Capacity Contract Line Items Documents

Use this procedure to add items to standard-capacity contract line items documents.

Prerequisites

Create a standard-capacity line items document as described in Creating Contract Line Items Documents (CLIDs) [page 223].

Procedure

1. If the line items document is not already open, open it by clicking the document name and choosing **Action** > **Open**.
2. If the **Add** and other editing buttons are not visible, click **Actions** > **Edit Content**.
   Complete any of the following steps to add items to a standard-capacity line items document.
3. To add an ad hoc item (item not from item master data or a library), choose **Add** > **Item**.
   a. In the **Add Item** page, enter a name for the item.
   b. **Optional:** Add a description.
   c. **Optional:** Select a value for the **Commodity**. By default, a value is required in the **Commodity** field to publish the document.
   d. **Optional:** Specify any access control restrictions.
   e. Specify a value for currency in the **Currency** field. The list of currencies available in the exchange rate chosen while creating the CLID is shown in the drop down list for you to choose from. When you edit the currency for a line item, you can choose to apply the exchange rate from the selected exchange rate set (if the specified conversion is available) and change the currency, or to change only the currency without applying any exchange rate conversion. When you update the **Currency** field of a line item, you are prompted to select whether to change only the currency and retain the provided value, or to both change the currency and apply the exchange rate from the selected exchange rate set. If you select the latter option, then the value of the line item is updated to reflect the exchange rate in the exchange rate set. Contract administrators can also add new exchange rate sets or update existing exchange rate sets and have the latest exchange rate sets apply to all linked contract objects, such as CLIDs.

      > Note
      >
      > When the `Application.ACM.UpdateSystemCurrencyExchangeRateSetInCommodityEscalationClauseAndCLID` parameter is enabled, the System Currency Exchange Rate Set updates are synchronized with the associated Commodity Escalation Clauses and CLIDs. For more information, see Update System Currency Exchange Rate Set In Commodity Escalation Clause And CLID.

   f. Enter values for terms, such as **Price** and **Quantity**. For additional information about terms for contract line items, see Contract Line Item Terms [page 232].

> ⓘ Note
>
> The value of **Price** must not exceed 11 characters, including two decimal places.

g. To add more terms for the line item, click the **Add** button in the bottom left corner of the **Item Terms** area and choose **Term**.

- On the **Add Terms** page, select a previously defined term from the **Available Terms** tab.
- Alternatively, open the **New Term** tab to define a new term.
- To add a formula term for the line item, click the **Add** button in the bottom left corner of the **Item Terms** area and choose **Formula**. On the **Add Formula** page, add a formula specifying the terms (say, a previously defined term from the **Available Terms** tab) and selecting the algebraic expression to compute as part of the formula.
- To add a lookup table term for the line item, click the **Add** button in the bottom left corner of the **Item Terms** area and choose **Lookup Table Terms**. On the **Add Formula** page, select the **Add Lookup Formula** checkbox to create lookup formulas based on the imported lookup table terms.

The following fields are relevant when defining a term for a contract line item:

- **Answer Type**: The type of data for the term, such as **Whole Number** or **Money**.
- **Acceptable Values**: Acceptable values for the term. If the **Answer Type** is a numeric type (including **Money**), you can select **Limited Range** and range fields will be displayed for you to specify minimum and maximum values.
- **Response Required**: Specifies if a value must be entered for the term.
- **Validation Pattern** and **Validation Pattern Error Message**: If you want users to provide the term value in a specific format, you can configure a validation pattern for the term. You can also configure an error message to appear when users provide a value that doesn't conform to the defined pattern. For more information about automatic validation of term values, see Automatic Validation of Term Values [page 235].

> ⓘ Note
>
> To validate the term value while making inline edits to a term, you must enable the **Enable CLID term validation based on specified pattern** (`(Application.ACM.ValidateTermBasedOnPattern)`) ICM parameter. For more information about the parameter, see Enable CLID term validation based on specified pattern.

Most of the remaining fields are relevant only for sourcing events. For information about these fields, see Event Management Guide.

4. To add items from item master data, choose **Add** > **Items From Item Master Data**.
   a. Enter search terms and click **Search**.

   If your site is integrated with multiple external systems but no external system is configured for your workspace, you can use the **External System** search filter to filter items based on the external system from which the data was loaded.

   For information about item master data search filters, see Item Master Data Search Filters [page 233].

   b. In the search results, click the check boxes for the items you want to add. Click **Copy**.
5. To add items from the line items document contained in the predecessor project (the workspace containing this line items document has a predecessor project that also contains a line items document), choose **Add** > **Content From Contract Workspace**.

The **Add Content from Contract Workspace** page opens.

a. **Optional:** If your site is integrated with multiple external systems but no external system is configured for your workspace, you can use the **External System** search filter to filter items based on the external system from which the data was loaded.
b. Click the check boxes for the items you want to add.
c. Click **Copy**.

6. To add service items, create a service hierarchy with a service line, optional service outlines, and service specifications.

   See Adding Service Items to Contract Line Items Documents [page 235] for additional information.

7. To add items from the sourcing library, choose **Add** > **Items From Library**.
   a. On the **Add Content From Library** page, find the document that contains the items you want to import. Either browse for the document by choosing **Explore Library**, or search for the document by choosing **Search Library or Events**.
   b. Select the document you want to copy from and click **Select**.
   c. Click the check boxes for the items you want to add or select **All Content**. Click **Copy**.
8. To add items from an Excel document, click **Excel Import** and choose **Upload a file from desktop** or **Select file from project**.
   a. If you chose **Upload a file from desktop**, the **Import Content from Excel** page opens. Create an Excel template with the columns needed by clicking the **Click here to open your Contract Line Items Document in an Excel Spreadsheet** link.
   b. Edit the Excel document by adding items to the **Contract Item Information** and **Item Attributes** worksheets as described in Editing Excel Versions of Contract Line Items Documents [page 243]. Save the Excel document on your file system.

   > Note
   >
   > While editing, ensure that the language of the worksheets matches with the locale as selected in **Preferences** > **Change default locale and currency** section of your profile settings.
   >
   > Example
   >
   > | Default locale | Worksheet langauge | Result of CLID import |
   > | --- | --- | --- |
   > | English | English | SUCCESS |
   > | English | Japanese | ERROR |
   > | Japanese | English | ERROR |

   c. Select your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
   d. Select how you would like to import the content (add to the content or replace the existing content). Click **Import**.

Next Steps

Members of the **Integration Protected Fields Editor** group can modify item master data after it is added to an event or line items document. However, modifying item master data can cause validation errors. If you attempt to send the line items document contents back to the external system, the external system might reject it.

Publish the document when you have finished adding data as described in Publishing Contract Line Items Documents [page 243]. Only the published contents of line items documents are sent to external systems.

Contract Line Item Terms

By default, items in a contract line items document (CLID) in projects on systems that do not have any external systems configured are created with the following terms:

- **Price**
- **Quantity**
- **Extended Price** (**Price** * **Quantity**)

By default, items in a contract line items document in projects with an **External System** that is an SAP ERP (the type of the external system is SAPECC, or SAP ERP Central Component) are created with the following terms:

- **Price** - The price of the line item. The value must not exceed 11 characters, including two decimals.
- **Quantity**
- **Extended Price** (**Price** * **Quantity**)
- **Plant** - SAP ERP Plant ID
- **Item Category** - The category to which the material belongs. Select **D (Services)** for service line items (SAP service specifications).
- **Material Group** - SAP ID for the Material Group.
- **Material Code** - A code that can be used to identify the material (not used by SAP).
- **Material Type** - SAP ID for the material type.
- **Incoterms** - International Commercial Terms ID that specifies Terms of Delivery.
- **Material Number** - SAP material number.
- **Requisition ID** - SAP requisition identifier for this line item.
- **RFQ ID** - SAP RFQ identifier for this RFQ.
- **Requisition Item Number** - Line number for this item in the requisition.
- **RFQ Item Number** - Line number for this item in this RFQ.

> ⓘ Note
>
> - SAP Ariba recommeds a maximum of 50 terms per line item in a CLID.
> - When SAP Ariba Contracts is integrated with an ERP system, either the material number or material code term value from the CLID, whichever is the latest added term, is used as the BuyerPartId in the ERP system. The BuyerPartId accepts empty cell values from the latest added term. You can enable the `Application.ACM.UseMaterialNumberOrMaterialCodeAsBuyerPartId` parameter to use either the material number or material code term value, whichever is available in the CLID, as the BuyerPartId in the ERP system. If the CLID contains both material number and material code, then the value of the

latest added term is used as the BuyerPartId in the ERP system. For more information, see Intelligent Configuration Manager parameters reference.

Item Master Data Search Filters

To search for text in all fields of the item master data, enter search terms in the "global" search box, which is the first, unlabeled search box. The search terms are used for a "begins with" search to look for text that begins with the search terms.

The global search behavior allows you to:

- Enter the beginning text of a word you are searching for. SAP Ariba supports begins-with text matching and looks in all searchable fields for words or groups of words that begin with the search strings you entered. For example, searching for entries with the text **`AAA`** matches entries with the text **`AAAB`** but not **`BAAA`**.
- Enter multiple words, separated by spaces or hyphens (**`-`**). If you specify multiple words, the search engine searches for records that contain all the words somewhere within them. To search for words in an exact sequence, enclose the sequence in double quotes (**`"`**).
  Each group of characters in the search string is treated separately. For example, you enter the following search string:
  `123 AAA`
  The results include records with matching strings such as:
  - **`1234 AAA`**
  - **`123 AAAB`**
  - **`AAAB 1234`**

  However, the search results would not include entries with the strings **`0123 AAA`**.
- Disregard capitalization in most cases. For example, searching for **`super`** is the same as searching for **`SUPER`** or **`Super`**. However, transitions from lowercase to uppercase split the search term and text that is searched. For example, you can find **`superStar`** by searching for **`star`**. If you enter **`superStar`** as a search term, it's equivalent to entering the two search terms **`super`** and **`star`**; it only matches items that have both the word **`super`** and the word **`star`** (or a word that begins with **`super`** and another word that begins with **`star`**).
- Use the Boolean operators **`and`** and **`or`**. By default, the Boolean operator **`and`** is applied if you specify multiple terms.
  The search does not treat these operators as literal words. Instead, it recognizes them as special operators that you can use to create complex search queries. For example:
  - **`building`** and **`construction`** returns only results that contain both of the words
  - **`building`** `or` **`construction`** returns results that contain one of the words

Description Field Searches

If you enter search terms in the **Description** field search box or use the global (unlabeled) search box to search for text in the **Description** field, the search terms are used for a "begins with" search in the **Description** field of the records using the global search behavior, with the following difference: the search engine stems the word by analyzing whether it ends in letters that might form a common suffix, and then stripping those letters out of the search term before running the search.

For example, in English, if you enter the search term **bats**, the search engine strips the s and finds strings that start with bat. The purpose of stemming is to perform the search using the root of the word in order to return a more complete list of results.

In English, stemming strips the following characters from the end of a search term:

- e
- ed
- es
- ing
- ly
- s
- y (replaced with i).

Stemming is also applied to text that is stored for searching. For example, the English word **Pony** in a description is stored with the root word **poni**. A stemmed search in English for **pony** matches this description because the search term **pony** is replaced with the root word **poni**. In addition, a stemmed search in English for **ponies** matches this description because the search term **ponies** is replaced with **poni**. However, a stemmed search in English for **poly** will not match the word **polyester** in a description. The search term **poly** is replaced with **poli**, but the **y** in **polyester** is not replaced because it is not at the end of the word **polyester**.

Sometimes, the characters that are stripped or replaced do not form a suffix. For example, in English, if you enter the search term **apple**, the e is stripped (even though the e is not a suffix), so the results include not only apple but also apply and application.

Other Field Searches

If you search for text in any field **except** the **Description** field (you enter search terms in the **Material Group**, **Material Number**, or **Plant** field filter or use the global search box to search for text in any field other than the **Description** field), the search terms are used for a "begins with" search in the matching fields of the records similar to the global search behavior, with the following additional delimiters applied to search terms and the data stored for searching:

- Transitions between numbers and letters. For example, the material number **A100** can be found by entering **100** in the **Material Number** search field filter.
- Underscores (_) (in addition to hyphens). For example, **AAA_BBB** searches for **AAA** and **BBB**. In addition, the material number **B_200** or **B-200** can be found by entering **200** in the **Material Number** search field filter.

Field searches are not case sensitive, but transitions from lowercase to uppercase letters split search terms and text in search items. For example, you can find **RawCopper** by entering **Copper** in a **Material Group** search field filter.

Stemming is applied only when searching for text in the **Description** field; stemming is **not** applied when searching for text in all other fields.

Automatic Validation of Term Values

A validation pattern can be configured for a term to define a format of the term value.

A validation pattern ensures that users provide a term value that conforms to a specific format. With a proper error message, you can notify users to provide a value in the desired format.

> **Example**
>
> You can ensure that an a term value includes only numbers, or only uppercase letters; or you can ensure that term value include exactly 9 numbers, or 2 uppercase letters followed by a dash (-) followed by 4 numbers.

You define the validation pattern using a regular expression, which is a sequence of characters that defines the pattern. Regular expressions use standard text strings and syntax to define patterns to which matching text must conform. You enter the regular expression in the **Validation Pattern** field while adding or editing a term. This field is only available for the answer types **Text (single line)** and **Text (single line limited)**.

You can provide a custom error message in the related **Validation Pattern Error Message** field. If you don't provide a custom error message, a generic error message shows the expected format instead. You can also provide translations for these error messages in all of the languages enabled in your site by clicking the **Translations** link to the right of the **Validation Pattern Error Message** field. An individual user's locale setting in their profile automatically determines which translation they see. If you don't provide translations, users in all locales see the error message in the original language in which you created it (the base language). You must be a member of the **Translator** group to provide translations.

The following regular expressions are some examples of simple validation patterns:

- `^[0-9]*$`: the term value must contain only numbers
- `^[A-Z]*$`: the term value must contain only upper-case letters
- `^[a-z]*$`: the term value must contain only lower-case letters
- `^[a-zA-Z0-9]*$`: the term value can contain any number or upper- or lower-case letter

However, regular expressions can also define more complex validation patterns. For example, an term value that must use 7 numbers in the format XXX-XXXX, would use the regular expression `^[0-9]{3}-[0-9]{4}$` as the validation pattern.

Adding Service Items to Contract Line Items Documents

Use this procedure to add service items to contract line items documents. If your site has the service hierarchies feataure enabled, you can use service hierarchies to add service items to events that are compatible with SAP service item (SAP Item Category D items) hierarchies. If SAP Ariba Contracts is integrated with SAP ERP, users can send service items from the contract line items document to SAP so that SAP will create a contract (outline agreement) with the service items.

Context

To be compatible with SAP, service items must be added in a service hierarchy with the following structure:

- **Service line**: The top-most level of a service hierarchy is a service line. A service line can contain both service outlines and service specifications; all service outlines and service specifications must be created inside a service line.
  - **Service outline**: Service outlines are optional and can be used to organize service specifications. Service outlines do not contain any terms. A service line can contain 0 - 4 service outlines. A service outline can contain both child service outlines and service specifications.
    - **Service specification**: A service specification specifies a service to be performed. A service specification cannot have any children below it, so it is the smallest unit of work or service that you want to track. Note that a sourcing event award cannot be split for a service specification (you must allocate 100% of an award for a service specification to a single supplier).

> **Note**
>
> Avoid dragging and dropping or cutting and pasting items between service lines if your site is integrated with an external ERP system. The mapping available in SAP Ariba is not reflected in the ERP system, which can cause failures due to a mismatch in sequence.

Procedure

1. Open a contract line items document (CLID) for editing.
2. Create a service line.

   A service line is the top level of a service hierarchy. All service outlines and service specifications must be contained in a service line.

   a. Select **Add** > **Service Line**.
   b. Enter a **Name** and **Description**.
   c. Enter values for additional terms if needed. If you do not specify a value for **Quantity**, the value 1 is assumed.
   d. **Optional:** Select access control values.
   e. Click **Done**.
3. **Optional:** Add service outlines.

   Service outlines are optional and used only to organize service specifications; they do not contain terms.

   A service hierarchy can contain up to 4 levels of outlines.

   a. In the event **Contents** area, check the box for the service line or service outline that will be the parent for the service outline you are adding.
   b. Select **Add** > **Service Outline**.
   c. Enter a **Name** and **Description**.
   d. **Optional:** Select access control values.
   e. Click **Done**.
4. Add service specifications.

   a. In the event **Contents** area, check the box for the service line or service outline that will be the parent for the service specification you are adding.
   b. Select **Add** > **Service Specification**.

c. Enter a **Name** and **Description**.
d. Enter values for additional terms if needed. If you do not specify a value for **Quantity**, the value 1 is assumed.
e. **Optional:** Select access control values.
f. Click **Done**.

Importing and Exporting Service Line Items and Pricing Conditions in Contract Workspaces Using An Excel File

Use this procedure to import and export service line item data and pricing conditions data in contract workspaces using the Simplified Excel Import functionality.

Prerequisites

- The service hierarchy feature must be enabled on your site. For more information, refer to Event Service Items and Service Hierarchies.
- Pricing conditions must be defined in the Contract Items Document (CLID) where you want to import data. For more information, refer to Pricing Conditions for Contract Line Item Documents [page 185].
- Your administrator must enable the **Enable import and export of service line items and pricing conditions in SAP Ariba Contracts using Simplified Excel Import** (`Application.ACM.SimplifiedExcelImportOfServiceLineItemsAndPricingConditions`) ICM parameter. For more information, refer to Enable import and export of service line items and pricing conditions in SAP Ariba Contracts using Simplified Excel Import.

Context

The Simplified Excel Import functionality enables buyers to import and export service line items data and pricing conditions data of line items in a quick and efficient manner. Based on their requirement, buyers can import service line items data to add service line items to the Contract Line Items Document (CLID), replace existing service line item data in the CLID, or export service line item data to an Excel file. Buyers can also import and export pricing conditions of line items in contract workspaces.

The standard Excel template that is available to import service line item data to a contract workspace contains the following worksheets:

- **Design Instructions**
- **Line items**
- **Pricing Conditions**

> Note
>
> This worksheet is available when the pricing condition rule is enabled in the contract workspace template.

Procedure

1. Open the CLID of the contract workspace.
2. Select **Simplified Excel Import**.

   The **Import Content from Excel** page appears.

   > Note
   >
   > If the **Simplified Excel Import** button is not visible, select **Actions** > **Edit Content**.

3. Select **Click here to import Contract Line Items Document in an Excel Spreadsheet** and save the Excel file to a preferred location on your computer.

   If there are service line items existing in the CLID, the details are exported to the Excel file. Pricing conditions existing for service specification items or material master items are also exported to the Excel file.
4. Open the file in Microsoft Excel to add or edit content.

   In the **Line items** worksheet, define the service hierarchy for the service line items by specifying a value in the **Number** column.

   > Example
   >
   > For a service item A, the hierarchy can be as follows:
   >
   > | Item Name | Item Type | Number |
   > |---|---|---|
   > | `Service Item A` | `Service Line` | `1` |
   > | `Service Outline A` | `Service Outline` | `1.1` |
   > | `Service Specification A` | `Service Specification` | `1.1.1` |
   > | `Service Specification B` | `Service Specification` | `1.1.2` |

   > Note
   >
   > - Do not remove the blue header row.
   > - By default, all terms are applied to all line items. If you do not want to include a term for a line item, enter `N/A` in the corresponding cell.

5. (Optional) Enter the pricing details of the line items in the **Pricing Conditions** worksheet.

   This worksheet is available only if the pricing condition rule is enabled in the contract workspace template.

   You can include pricing conditions for items of type **Service Specifications** and **Items From Item Master Data** only.

   > → Tip
   >
   > If a line item doesnt support pricing conditions, its value in the **Advanced Pricing Conditions** column is **N/A**.

6. Save your changes.

7. On the **Import Content from Excel** page, choose an option to import the content.
    - **Add to document**: Select this option if you are adding data or updating existing data in the CLID. Existing line items in the document are not deleted.
    - **Replace document**: Select this option to delete the existing line item data and replace it with the content from the Excel file.
8. Select **Choose File** and locate the file from your computer.
9. Select **Import**.

Results

If successful, the data is imported to the contract workspace and populated in the CLID.

If unsuccessful, a message appears indicating whether there are errors or warnings with the data import. If there are errors, the data is not imported. If there are warnings, the data is imported but the values of the affected fields are not set. If the data is existing, then the previous values are not modified. Select **View details** to find more information about the identified issues. You can correct the errors in the Excel file and repeat the data import procedure, or manually add the values in the user interface.

Importing and Exporting Line Items in Large-Capacity Contract Line Items Documents Using an Excel File

Use this procedure to import and export line items in a large-capacity Contract Line Items Document (CLID) using an Excel file with the Simplified Excel Import functionality.

Prerequisites

- The CLID of the contract workspace where you want to import and export data must be configured as a large-capacity CLID. For information about creating a large-capacity CLID, refer to Creating Contract Line Items Documents (CLIDs) [page 223].
- Your administrator must enable the following ICM parameters:
    - **Import and export line items in large-capacity CLIDs using Simplified Excel Import** (`Application.ACM.ImportAndExportLineItemsInLargeCLIDUsingSimplifiedExcelImport`). For more information about the parameter, refer to Import and export line items in large-capacity CLIDs using Simplified Excel Import.
    - **Asynchronous export of line items data from large-capacity CLIDs** (`Application.ACM.BGWorkForLargeCLIDExport`). For more information about the parameter, refer to Export Large Contract Line Items Documents.
- To import details related to service line items and pricing conditions to the CLID:
    - The service hierarchy feature must be enabled on your site. For more information, refer to Event Service Items and Service Hierarchies.

- Pricing conditions must be defined in the CLID. For more information, refer to Pricing Conditions for Contract Line Item Documents [page 185].
- The **Enable import and export of service line items and pricing conditions in SAP Ariba Contracts using Simplified Excel Import** (`Application.ACM.SimplifiedExcelImportOfServiceLineItemsAndPricingConditions`) ICM parameter must be enabled. For more information about the parameter, refer to Enable import and export of service line items and pricing conditions in SAP Ariba Contracts using Simplified Excel Import.

Context

The Simplified Excel Import functionality provides an efficient solution to import line items data to large-capacity CLIDs. Buyers can import line items data using a preformatted Excel file to add or update up to 10 thousand line items in the CLIDs of contract workspaces. Buyers can also import details related to service line items and pricing conditions to the CLID.

Procedure

1. Sign in to the application and locate the contract workspace containing the CLID.
2. Select CLID and choose **Actions** > **Open**.
3. Select **Download Simplified Content** to download a preformatted Excel file containing sample data.
4. Prepare the data to import.

   You can refer to the format of the sample data to prepare your data to import.

   > **Note**
   >
   > If you are importing pricing conditions, enter the details in the **Pricing Conditions** worksheet.
5. Save the changes.
6. On the CLID page, select **Import Simplified Content**.

   The **Import Content from Excel** page appears.
7. Select an option for importing the content.
   - **Add to document**: Select this option if you are adding data or updating existing data in the CLID. Existing line items in the document are not deleted.
   - **Replace document**: Select this option to delete the existing line item data and replace it with the content from the Excel file.
8. Select **Choose File** and to locate the file from your computer.
9. Select **Import**.

   The data import request is submitted. A scheduled job picks up the request and imports the data to the CLID. This operation happens asynchronously in the background. You can refresh the page or reopen the document after some time to see the progress.
10. To export the data in the CLID, select **Download Simplified Content**.

11. **Optional:** To delete the content imported to the CLID, select **Reset**.

> ⚠ Caution
>
> This operation removes all the content from the CLID and the deleted data cannot be recovered.

Adding Items to Large-Capacity Contract Line Items Documents

Use this procedure to add items to large-capacity contract line items documents.

Prerequisites

You must create a large-capacity line items document as described in Creating Contract Line Items Documents (CLIDs) [page 223]

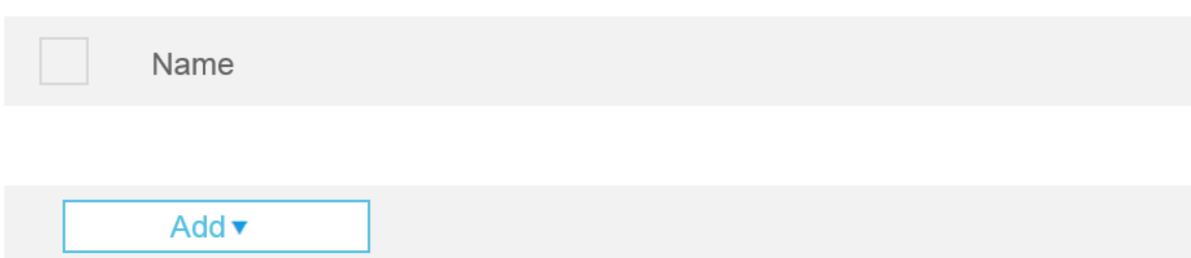
Context

> ⚠ Limitations
>
> To add material master data items to a large-capacity document, you must add the items to a standard-capacity document, export the standard-capacity document to an Excel file, then import the Excel file to a large-capacity document.

Procedure

1. If the document is not already open, click the document name in the **Documents** area and choose **Open**.
2. If this is the first time you are adding data, you will see an **Enter sample data** area. Enter sample data to create an Excel template with the format required by SAP Ariba Contracts. Add at least one item with the terms you want to use so the template contains entries for the terms.

> ⓘ Note
>
> The entries you add here are in the sample data only; they are not added to the line items document until you export them to an Excel file and import them into the line items document.



a. Choose **Add** > **Item**.
b. In the **Add Item** page, enter a name for the item.
c. **Optional:** Add a description. Specify the commodity and any access control restrictions.
d. Enter values for terms, such as **Price** and **Quantity**.

> Note
>
> The value of **Price** must not exceed 11 characters, including two decimal places.

e. To add more terms for the line item, click the **Add** button in the bottom left corner of the **Item Terms** area and choose **Term**. On the **Add Terms** page, select a previously defined term from the **Available Terms** tab. Alternatively, open the **New Term** tab to define a new term.

The following fields are relevant when defining a term for a contract line item:

- **Answer Type**: The type of data for the term, such as **Whole Number** or **Money**.
- **Acceptable Values**: Acceptable values for the term. If the **Answer Type** is a numeric type (including **Money**), you can select **Limited Range** and range fields will be displayed for you to specify minimum and maximum values.
- **Response Required**: Specifies if a value must be entered for the term.

Most of the remaining fields are relevant only for sourcing events. For information about these fields, see Event Management Guide.

3. Click **Download content**. When SAP Ariba Contracts has finished generating the template, a browser dialog box opens with access options for the file. Click **Open** or **Save**.
4. Edit the Excel file as described in Editing Excel Versions of Contract Line Items Documents [page 243]. Save the Excel file on your file system.
5. Click **Import Content**.

The **Import Content from Excel** page opens.

6. Select how you want to import the content (add to the content or replace the existing content).
7. Select your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
8. Click **Import**.

A **Large Contents Summary** page opens that includes the status of your Excel import request. The initial status is **The Excel import request has been submitted successfully**.

You do not have to keep this page open while your request is being processed; you can click **Done** to return to the workspace. When your Excel import has been processed, the status changes to **The Excel import request has been completed successfully**.

Next Steps

Publish the document when you have finished adding data as described in Publishing Contract Line Items Documents [page 243]. Only the published contents of line items documents are sent to external systems.

Publishing Contract Line Items Documents

Use this procedure to publish contract line items documents.

Context

Only the published contents of a line items document are sent to an external system. If a line items document is in the draft state and you send the contract to an external system, the contents of the last published document are sent.

Procedure

Click the name of the line items document and choose **Action** > **Publish**.

Results

If there was a previously published version of the document, a page with a **Line Items Document Changes** table opens. The table shows the differences between the last published version of the document and the draft version. The table contains a row for each modified or deleted item and the following columns:

- **Published Version**: Name of the item in the last published version. Click the item name and choose **Action** > **View Details** to view all the attributes and terms for the last published version of the item.
- **Draft Version**: Name of the item in the draft version. Click the item name and choose **Action** > **View Details** to view all the attributes and terms for the draft version of the item.
- **Change Type**: Type of change. Possible values are: **Updated** (attributes or terms were changed), **Added** (this item was added in the draft version), or **Deleted** (this item was deleted in the draft version).

Editing Excel Versions of Contract Line Items Documents

Use this procedure to edit Excel versions of contract line items documents.

Context

You edit contract line items documents using Excel files in the following cases:

- The line items document is a large-capacity line items document.

- You choose to import the contents of a standard-capacity line items document from an Excel file.
- You were asked to review a line items document and are an external reviewer (you do not have an SAP Ariba Contracts user account), or an internal reviewer who does not have edit access. External reviewers receive an Excel version of the line items document. Both external reviewers and internal reviewers who do not have edit access can submit an Excel version of the line items document with changes.

> ⓘ Note
>
> Be careful when modifying terms for material master items. Modified values can cause validation errors.

An Excel version of a line items document includes the following worksheets:

- **Contract Item Information**: Contains a row for each line item and columns for item attributes and basic terms.An Excel version of a line items document also includes the following worksheets:
- **Item Attributes**: Contains additional terms for line items. If the item was added from item master data, it contains values for material master terms. If there is an associated compliance contract, it contains values for attributes set in the compliance contract.
- **Contract Header**An Excel version of a line items document also includes the following: Contains columns with project header values.

  > ⓘ Note
  >
  > These values are provided to users for information only. SAP Ariba does not import values from this worksheet, so changes to this worksheet have no effect on the project.
- **Header Attributes**: Not used.

Procedure

1. If you do not already have an Excel version of the line items document, generate one.
   - If this is a standard-capacity line items document, open the document. If the **Excel Import** button is not visible, click ▶ **Actions** ▶ **Edit Content** ◀. Click **Excel Import**, and choose **Upload a file from desktop**. On the **Import Content from Excel** page, click the **Click here to open your Contract Line Items Document in an Excel Spreadsheet** link.
   - If this is a large-capacity document, generate an Excel version of the line items document as described in Adding Items to Large-Capacity Contract Line Items Documents [page 241].
2. Open the Excel document and open the **Contract Item Information** worksheet. If you are adding a line item, copy an existing row and paste it into an empty row.
3. Enter or change cell values for the following terms:
   - **Short Name**
   - **Description**
   - **Unit of Measure**
   - **Unit Price**
   - **Classification Domain**
   - **Classification Code** (code for classifying the item, such as a commodity code)
   - **Quantity**

The worksheet contains additional columns, but values for these columns are not imported.

4. If you are adding an item and any of the following conditions are true, specify a new, unique value in the **Item Number** cell so you can add entries in the **Item Attributes** worksheet for this item:
   - you need to specify terms in that cannot be specified on the **Contract Item Information** worksheet (terms other than those listed in step 3)
   - you are adding an item from material master data
   - this workspace has an associated SAP Ariba procurement or invoicing compliance contract and you want to specify compliance contract attributes

   If you are not specifying values in the **Item Attributes** worksheet, you can leave the **Item Number** cell blank. SAP Ariba uses the **Item Number** value to correlate a line item with item attributes specified in the **Item Attributes** worksheet at import time. SAP Ariba generates new values for the item number when storing the line items, so you might see changed values for the item number if you generate a new Excel version of the line items document.
5. If you need to specify or modify additional terms or attributes, open the **Item Attributes** worksheet. In most cases, there will be a set of rows for each item (multiple rows with the same value in the **Item Number** column).
   a. If you are adding an item, copy a set of rows and paste it with an empty row as the insertion point. Change the **Item Number** value in the copied rows to the value you specified for the new item in the **Contract Item Information** worksheet.
6. Change the **Attribute Value** cell values as needed.

Excel Format for Contract Line Items Documents

An Excel version of a contract line items document contains the following worksheets:

- **Contract Header**
- **Contract Item Information**
- **Header Attributes**
- **Item Attributes**

All cells in the worksheets are general format cells.

> ⓘ Note
>
> Ensure that the language of the worksheets required in your contract line items document matches with the base language of the respective contract workspace.
>
> Example
>
> | Contract workspace base language | Worksheet langauge | Result of CLID import from webservice |
> |---|---|---|
> | English | English | SUCCESS |
> | English | Japanese | ERROR |
> | Japanese | English | ERROR |

Contract Header Worksheet Columns

A **Contract Header** worksheet contains the columns shown in the following table. When a line items document is exported, the values are provided for information only. SAP Ariba does not import values from this worksheet.

Column	Description
Event ID	Document ID and title (`docId` - `title`) of the line items.
Title	Title of the line items document.
Description	Description for the line items document.
Requester	ID of the user who created or updated this document.
Company Name	SAP Ariba does not set or read this field.
Supplier Name	Supplier field from the project header.
SupplierID Domain	Domain from which the supplier ID is assigned, such as buyer-systemid or sap. A supplier can have multiple IDs, each as-signed from a different domain.
SupplierID Value	Supplier ID.
Contract Source	SAP Ariba does not set or read this field.
Buyer Contract ID	The corresponding SAP Ariba procurement or invoicing com-pliance contract ID.
Term Type	Contract type. This is always **Item**. Note The value is mapped to the buyer contract type.
Limit Type	Specifies how the limit is regulated--by **Amount** (cost of items) or **Quantity** (number of items).
Agreement Date	Agreement Date from the workspace header.
Effective Date	Effective Date from the workspace header.
Expiration Date	Expiration Date from the workspace header.
Contract Currency	SAP Ariba does not set or read this field.
Minimum Amount	SAP Ariba does not set or read this field.
Maximum Amount	SAP Ariba does not set or read this field.

Column	Description
Reference Document	If the line items document was created from a contract terms link to a compliance contract, this is the ID of the contract terms.

Contract Item Information Worksheet Columns

Column	Description
Bundle	Bundle name, as specified in the event award (for line items documents created from SAP Ariba Sourcing event awards).
Item Number	Used by SAP Ariba to correlate an item with attributes in the **Item Attributes** worksheet and to identify an item.
External System Line Number	The contract line number in the SAP ERP system used by SAP Ariba to match the line number to update in the SAP ERP system, when changes are made in SAP Ariba Contracts.
Short Name	Item name.
Description	Item description.
Extended Description	Full Description field for a compliance contract.
Supplier Part Number	Supplier part number.
Unit of Measure	Unit of measure for the unit price (Price Unit field for a compli-ance contract).
Unit Price	Price per unit.
Discount Amount	Discount, specified as a fixed amount.
Supplier Discount (%)	SAP Ariba does not set or read this field.
Unit Price Currency	Currency type for unit price.
Classification Domain	Domain for the category or classification, such as UNSPSC for commodities.
Classification Code	Category or classification code, such as a commodity code.
Quantity	The number of units.
Minimum Quantity	Minimum number of items that can be purchased.

Column	Description
Maximum Quantity	Maximum number of items that can be purchased.
Minimum Amount	Minimum value of the items that can be purchased.
Maximum Amount	Maximum value of the items that can be purchased.
Manufacturer Name	Name of manufacturer.
Manufacturer Part Number	Manufacturer's part number.
Limit Type	Specifies how the limit is regulated--by Amount (cost of items) or Quantity (number of items).
Number	Used for service item hierarchies. A string with a unique dotted-decimal value that indicates the item's hierarchy and its position in the hierarchy. For example, items with **Number** values `2`, `2.1`, and `2.1.1` are members of the same hierarchy. The item with **Number** `2` is at the highest level of the hierarchy and the item with **Number** `2.1.1` is at the lowest level. **Number** is used only to define service item hierarchies and is ignored if **LineType** is not `Service Line`, `Service Outline`, or `Service Specification`. **Number** has no effect on an item's order in a list, other than ensuring that the items in the same hierarchy are listed together and in descending order.
LineType	Used for service item hierarchies. Specifies the type of service item. Valid values: • `Service Line` (top-most level; all service outlines and service specifications must be contained in a service line) • `Service Outline` (optional objects used to organize service items; can contain child service outlines or service specifications) • `Service Specification` (specifies a service to be performed; cannot contain any children)

Header Attributes Worksheet Columns

The following columns are present in the **Header Attributes** worksheet but SAP Ariba does not set or read values for these columns:

- **Attribute Name**
- **Attribute Value**
- **Display Text**

- **Type**
- **Description**
- **Table Section Column**

Item Attributes Worksheet Columns

The **Item Attributes** worksheet contains one row for each term defined for each line item.

Column	Description
Item Number	Used by SAP Ariba to correlate attributes with an item in the **Contract Item Information** worksheet.
Attribute Name	Attribute name.
Attribute Value	Attribute value.
Display Text	Optional display text for the attribute.
Type	Data type for the attribute, such as **Text** or **Money**.
Description	Optional description for the attribute.

Items added from SAP item master data have entries with the following **Attribute Name** values:

Attribute Name Column Value	Description
Item Category	Category to which the material belongs.
Material Group	Name of the material group for the item.
Material Number	Number (ID) of the material group for the item.
Material Type	Material type for the item.
Incoterms	International Commercial Terms ID that specifies Terms of Delivery.
Material Code	Material code for the item.
Requisition ID	ID of the ERP requisition for the item.
RFQ ID	ID of the ERP RFQ for the item.
Requisition Item Number	Line number for this item in the ERP requisition.
RFQ Item Number	Line number for this item in the ERP RFQ.
Base Unit Of Measure	Unit of measure in which the stocks of the item is measured.

Attribute Name Column Value	Description
Order Unit	Unit of measure used when ordering this item.
Plants	ERP IDs of plants that may purchase this item. IDs are enclosed by square brackets and delimited by a comma and space. For example: `[1000, 2000]`.

Sending Contract Data and Line Items to an SAP ERP or to SAP S/4HANA Cloud

Use this procedure to send contract data and line items to an SAP ERP or to SAP S/4HANA Cloud.

Prerequisites

- The contract workspace must be published and contain a published line items document.
- Your SAP Ariba Contracts solution must be configured for integration with an SAP ERP or with SAP S/4HANA Cloud, as described in the Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.
- If your site is integrated with multiple external systems, the **External System** project field must be set. (If you are integrated with only one external system, the **External System** field is set for you and is not visible.)
- The **Document Type** project field value is **Contract**.
- The **Document Category** project field value is **WK Value Contract** or **MK Quantity Contract**. This value is sent to the SAP ERP and determines the type of SAP outline agreement (contract) created.
- To send a line item that the SAP ERP uses to create a service specification:
  - The **Commodity Code** value for the line item must be a value that is mapped to an SAP commodity code used for service items.
  - The **Item Category** for the line items must be **D (Service)**.
- To send a line item that SAP S/4 HANA Cloud uses to create a service specification:
  - The **Commodity Code** value for the line item must be a value that is mapped to an SAP commodity code used for service items.
  - The **Item Category** for the line items must be **D (Service) or 9 (Service)**.

> ⓘ Note
>
> By default, SAP Ariba Contracts assigns line item numbers sequentially (1, 2, 3, and so on). In contrast, SAP ERP and SAP S/4HANA may use increments of 10 (10, 20, 30, and so on).
>
> When contracts are transferred between SAP Ariba Contracts and SAP ERP or SAP S/4HANA, these differences in numbering formats may lead to integration issues. To maintain data consistency and prevent errors, SAP Ariba recommends aligning SAP ERP or SAP S/4HANA's line item numbering format with the sequential numbering used in SAP Ariba Contracts.

> If a customized numbering format is required in SAP ERP or SAP S/4HANA, you can configure it on the user interface or using the customization features available in SAP Integration Suite, managed gateway for spend management and SAP Business Network.

Context

Project data and items from a project's line items document can be sent to only one ERP. If your site is integrated with multiple ERPs, you can create a "parent" line items document with items from multiple ERPs, then create follow-on projects, where each follow-on project contains a line items document with items from an individual ERP. See Sending Contract Data and Line Items to Multiple SAP ERPs [page 252] for more information.

Procedure

Navigate to the **Overview** area of a procurement contract workspace and select **Actions** > **Send to External System**.

Results

Possible values for the **Status** field are:

- **Integrated**: The CLID was sent to the external system and the item has not been modified or updated since.
- **Updated and to be Integrated**: The CLID was sent to the external system, then the item was modified but the CLID with the modified item has not been sent to the external system. A user must republish the CLID and choose **Send to External System** to send the modified data to the external system.
- **Updated and Integrated**: The CLID was sent to the external system, then the item was modified, and CLID with the modified data was sent to the external system.
- **Deleted and to be Integrated**: The CLID was sent to the external system, then the item was deleted but the CLID with the deleted status for the item has not been sent to the external system. A user must republish the CLID and choose **Send to External System** to send the CLID with the deleted status for the item to the external system.
- **Deleted and Integrated**: The CLID was sent to the external system, then the item was deleted, and CLID with the deleted status for the item was sent to the external system.
- **Not Integrated**: The CLID with the item has not been sent to the external system.
- **Deleted**: The item was deleted and no data was sent to the external before it was deleted. No action is required.

Sending Contract Data and Line Items to Multiple SAP ERPs

Use this procedure to send contract data and line items to multiple SAP ERPs.

Prerequisites

- Your SAP Ariba Contracts solution must be configured for integration with an SAP ERP, as described in the Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.
- Your site must have multiple external systems configured.
- To send a line item that the SAP ERP uses to create a service specification:
  - The **Commodity Code** value for the line item must be a values that is mapped to an SAP commodity code used for service items.
  - The **Item Category** for the line items must be **D (Service)**.

Context

Project data and items from a project's line items document can be sent to only one ERP. If your site is integrated with multiple ERPs, you can create a "parent" line items document with items from multiple ERPs, then create follow-on projects, where each follow-on project contains a line items document with items from an individual ERP.

Procedure

1. Create an SAP Ariba Contracts procurement contract workspace. Do **not** select a value for the **External System** field (leave it set to **No value**).
2. Create a standard-capacity line items document as described in Creating Contract Line Items Documents (CLIDs) [page 223].
3. Add item master data items as described in Adding Items to Standard-Capacity Contract Line Items Documents [page 229], with the following difference: on the **Add Content From Item Master Data** page, there is an additional **External System** filter. Select an ERP from the menu, then search for and copy items to the document.
4. Click **Save as Draft** (you cannot publish a line items document that contains items from multiple external systems).
5. Create a follow-on project for each ERP to which you want to send contract data.
   a. Navigate to the **Overview** area of the workspace and select **Actions** > **Create** > **Follow-on Project**.
   b. On the **Create Project** page, click **Contract Workspace (Procurement)**.
   c. On the **Create Contract Workspace (Procurement)** page:
      - Select **Yes** for the **Select line items from contract content document?** prompt.

- Select a value for **External System**, **Document Type**, **Document Category**, and any other fields for the ERP.
- Specify or modify values for other project fields as needed.
- Select a project template.

Click **Create**.

A **Select Line Items To Copy** page opens with the items from the line items document in the original (predecessor) project.

6. On the **Select Line Items To Copy** page, select items from the line items document contained in the original (predecessor) project to add to the document in the new project.
   a. Click the check boxes for the items you want to add.
   b. Click **Copy**.

   You can also add items from the line items document contained in the predecessor project by opening the line items document and choosing **Add** > **Content From Contract Workspace**.
7. When the contents of the line items document are complete, click **Publish**.
8. When the workspace information is complete and all required tasks for the workspace are complete, publish the workspace. Navigate to the **Contract Attributes** area of the workspace and choose **Actions** > **Publish**.
9. When you are ready to send the contract data to the external system, navigate to the **Contract Attributes** area of the workspace and choose **Actions** > **Send to External System**.

Results

Possible values for the **Status** field are:

- **Integrated**: The CLID was sent to the external system and the item has not been modified or updated since.
- **Updated and to be Integrated**: The CLID was sent to the external system, then the item was modified but the CLID with the modified item has not been sent to the external system. A user must republish the CLID and choose **Send to External System** to send the modified data to the external system.
- **Updated and Integrated**: The CLID was sent to the external system, then the item was modified, and CLID with the modified data was sent to the external system.
- **Deleted and to be Integrated**: The CLID was sent to the external system, then the item was deleted but the CLID with the deleted status for the item has not been sent to the external system. A user must republish the CLID and choose **Send to External System** to send the CLID with the deleted status for the item to the external system.
- **Deleted and Integrated**: The CLID was sent to the external system, then the item was deleted, and CLID with the deleted status for the item was sent to the external system.
- **Not Integrated**: The CLID with the item has not been sent to the external system.
- **Deleted**: The item was deleted and no data was sent to the external before it was deleted. No action is required.

Adding a Lot to a Contract Line Items Document (CLID)

Use this procedure to add a lot to a contract line items document.

Prerequisites

The Mixed Cases/PrePack Support for Contracts feature must be enabled for your site.

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration.

Contract line items documents can be created in SAP Ariba Contracts procurement contract workspaces only.

Context

In SAP Ariba sourcing events and contract workspaces, "lot" is a term used to describe a group of items. In other circumstances, lots can also be referred to as mixed cases, prepacks, sets, or structured articles.

When a Basket Lot with Items (also known as a mixed case or prepack) is copied from a sourcing event to a CLID, it is copied to the CLID as a lot with line items.

If a contract workspace is sent to an external system, only lot level pricing is sent to the external system. Details of line items within the lot are not sent.

Procedure

1. From the **Home** dashboard, select **Create** > **Contract Workspace (Procurement)**.
2. Specify the title and other details for the contract workspace and click **Create**.

   Ensure that you select a template that contains a lot definition.
3. Open the CLID document by clicking the document name and choosing **Action** > **Open**.
4. Select **Add** > **Lot** under **All Content**.
5. Enter the required details for the lot.
6. Select **Done**.
7. **Optional:** When you have added at least one line item to a lot you can then use the **Excel Import** > **Upload a file from desktop** functionality to edit and add or remove line items using an Excel spreadsheet.

   In an Excel spreadsheet, line items and lots are differentiated in the Description column. Line items are numbered, "Line 1", "Line 2", and so forth. Lots are identified as "Line n inside lot".

   > Note
   >
   > A lot that must have at least 1 line item in a contract workspace.

Related Information

[Adding a Contract Workspace Lot or Line Item for Multiple Plants [page 255]](#)

Adding a Contract Workspace Lot or Line Item for Multiple Plants

Use this procedure to add a contract workspace lot or line item for multiple plants.

Prerequisites

The Mixed Cases/PrePack Support for Contracts feature must be enabled for your site.

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration.

Contract line items documents can be created in SAP Ariba Contracts procurement contract workspaces only.

Context

In SAP Ariba sourcing events and contract workspaces, "lot" is a term used to describe a group of items. In other circumstances, lots can also be referred to as mixed cases, prepacks, sets, or structured articles.

When a Basket Lot with Items (also known as a mixed case or prepack) is copied from a sourcing event to a CLID, it is copied to the CLID as a lot with line items.

If a contract workspace is sent to an external system, only lot level pricing is sent to the external system. Details of line items within the lot are not sent.

Procedure

1. On the SAP Ariba solution Home Dashboard, select **Create** > **Contract Workspace (Procurement)**.
2. Complete the necessary project fields and select **Create**.
3. Select **CLID** under **Documents**, and select **Open**.
4. Select **Add** and then select one of the following options from the pull-down menu:
   - **Lot** - go to step 6
   - **Item** - go to step 6
   - **Items From Item Master Data** - go to step 5
   - **Content From Article Master Data** - go to step 5

- **Items From Library** - go to step 5

5. Search for an item or lot and add it to the Line Items Document (LID).
6. If there is no plant associated with the item or lot, you must do the following to add a Plant term:
   a. Under **Item Terms** or **Lot Terms**, select **Add** > **Term**.
   b. Select the **Plant** term from the **Source Type: System Global** list and select **OK**.
7. Select the **Plant** term in the lot or line item and click **Edit**.
8. Select the following settings for the Plant term and then click **OK**.
   - **Response Required** = Yes, Owner Required
   - **Visible to Participant** = Yes
   - **Is this a matrix item** = Yes
   - **Display term in column or row** = Column
9. Complete the lot or line item fields and select an initial plant value for the item in the **Plant** field, then select **Done**.
10. Select the lot or line item and click **Edit** > **Matrix**.
11. Under **Matrix Term**, select **Plant**.
12. Under **Matrix Factors**, select **Add** and add additional plants for which you want to get prices for the item or lot.
13. Complete and publish the contract workspace.
    In the Line Items Document, the lot or item is repeated with a different plant defined for each version.

Sending a Line Item Document Containing a Lot with Article Master Data Items to an ERP

Use this procedure to send a line item document containing a lot with article master data items to an ERP.

Prerequisites

- Your site must have the SAP Ariba Strategic Sourcing Suite.
- Your solution must be configured to connect to an external ERP through the SAP Integration Suite, managed gateway for spend management and SAP Business Network. For more information, see SAP Integration Suite, Managed Gateway for Spend Management and SAP Business Network Configuration Guide and SAP Integration Suite, Managed Gateway for Spend Management and SAP Business Network Overview Guide.
- The `Application.AQS.ArticleIntegration.ArticleDataCreation.Enabled` site configuration option must be enabled.
- Feature "Create Article Master Data from event and parameter" must be enabled for your site.

Context

You can create a line item document (LID) in a contract workspace in your SAP Ariba solution containing a lot (display set) made up of items from article master data and send that line item as an outline agreement (OA) to your ERP system.

Procedure

1. Open the line item document on the contract workspace overview page.
2. Select **Actions** > **Edit Content** and then select **Actions** > **Master Data Creation**.
3. Select the check box for the lot article and click **Send Articles**.

Results

The status of the document is updated to CREATED in your SAP Ariba solution when receipt is acknowledged by the ERP and the corresponding document has been created in article master data there.

Adding or Linking a Commodity Escalation Clause to a CLID

Use this procedure to add or link a commodity escalation clause to a CLID.

Prerequisites

The Mixed Cases/PrePack Support for Contracts feature must be enabled for your site.

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration.

Contract line items documents can be created in SAP Ariba Contracts procurement contract workspaces only.

Context

A commodity escalation clause is a clause or condition that ensures that the pricing of a commodity in your contract is automatically updated if the market price of one or more of its components exceeds a certain threshold.

Procedure

1. Navigate to your contract workspace.
2. Click the **Documents** tab.
3. Open the Contract Line Items Document (CLID) to which you want to add a commodity escalation clause. To create a new CLID, click **Actions** and then click **Line Items Document** to create a new CLID and add line items to it.
4. Select the line item to which you want to add a commodity clause.
5. In the **Commodity Escalation Clause** field, select the commodity escalation clause that you wish to add to the contract workspace from the list of available commodity escalation clauses. For example, choose the Copper Monthly commodity escalation clause.
6. Click **Done**. When the price for the commodity changes, you can verify that your contract workspace displays the updated price for the commodity in the CLID and that the updated price is used to re-calculate any formula terms that use the commodity.

Related Information

Commodity Price Escalation Clause Management

Adding a Formula to a Commodity Escalation Clause in a CLID

Use this procedure to add a formula to a commodity escalation clause in a CLID.

Prerequisites

The Mixed Cases/PrePack Support for Contracts feature must be enabled for your site.

To use CLIDs, the `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter must be set to `Yes`. For information about how to manage parameters, refer to Intelligent Configuration Manager Administration.

Contract line items documents can be created in SAP Ariba Contracts procurement contract workspaces only.

Context

A commodity escalation clause is a clause or condition that ensures that the pricing of a commodity in your contract is automatically updated if the market price of one or more of its components exceeds a certain threshold.

Procedure

1. Navigate to your contract workspace.
2. Click the **Documents** tab.
3. Navigate to and open your Contract Line Items Document (CLID).
4. In the **Add to Currently Selected** section, search for or select the commodity whose escalation clause you want to link to the CLID. Alternatively, on the line item page, choose a commodity escalation clause from the **Commodity Escalation Clause** chooser. The price of the item that you specified when you created the escalation clause is displayed.
5. Specify the composition (in the given unit) for the commodity.
6. Click **Add** > **Formula**.
7. Add a formula term. You can add a formula term by typing the term or by clicking the **Insert** option next to the term and selecting the algebraic expression to compute as part of the formula. For example, if you created a line item, Electrical Cables, and linked it to the commodity Copper wire (with Copper_wire _Price and Copper_wire_Composition as the terms), you can add a formula term, Total Escalated Price, which adds the price of the components in the commodity to the base price of the commodity: Total Escalated Price = 'Price' + 'Copper_wire_Price' * 'Copper_wire_Composition'. This example included only copper. In general, you can have a formula term that adds the prices of all the components in the commodity.
8. Click **Done**. If you added a price to a commodity for a date within the provided dates for the escalation clause, and return to your contract workspace (user task), you can verify that the price for the commodity is updated in the CLID and the updated price is used to calculate the formula for the formula term.

Related Information

Commodity Price Escalation Clause Management

Mass Editing CLID Line Item Terms

If you have terms that are common to multiple line items in a contract line items document (CLID) and you want to edit those terms to contain the same values for all selected line items, you can edit those terms in a single action using this procedure.

Procedure

1. Open the line items document on the contract workspace overview page.
2. Select the line items that you want to edit.
3. Select **Actions** > **Edit** > **Content**.
   A page is displayed which shows the selected items and the terms that are common across all selected line items. All terms are de-selected by default and the values from the first of the selected line items are included as default values.

4. To edit a term, select the checkbox beside the term and enter the value that you want to be applied to that term in all of the selected line items.
5. Click on **OK**.
   The values that you entered are copied to all of the selected line items in the line items document.

Enabling the Purchase Information Record Document Type

Use this procedure to enable the purchase information record document type.

Context

SAP Ariba Customer Support might ask you to run a scheduled task. Scheduled tasks perform specific administrative or maintenance tasks.

Procedure

1. On the dashboard, click **Manage** > **Administration**.
2. In Ariba Administrator, click **Site Manager**, and then click **Scheduled Tasks**.
3. Enter `MigratePIREnumerationTask` in the **Task Name** field and click **Search**.
4. Click **Run** next to the scheduled task name.
5. Click **OK** to run the scheduled task, or **Cancel** to return to the previous page without running the scheduled task.

Results

Purchase Information record is now available in the document type field pull-down menu.

Sending Purchase Information Records to an SAP ERP

Use this procedure to send purchase information records to an SAP ERP.

Prerequisites

- The contract workspace must be published and contain a published line items document.
- Your SAP Ariba Contracts solution must be configured for integration with an SAP ERP, as described in the Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.
- If your site is integrated with multiple external systems, the **External System** project field must be set. (If you are integrated with only one external system, the **External System** field is set for you and is not visible).
- The **Document Type** project field value is **Purchase information record**.
- The **Document Category** project field value is **WK Value Contract** or **MK Quantity Contract**. This value is sent to the SAP ERP and determines the type of SAP outline agreement (contract) created.

Context

Project data and items from a project's line items document can be sent to only one ERP. If your site is integrated with multiple ERPs, you can create a "parent" line items document with items from multiple ERPs, then create follow-on projects, where each follow-on project contains a line items document with items from an individual ERP.

Procedure

1. Navigate to the **Overview** area of a procurement contract workspace.
2. Choose **Actions** > **Send to External System**.

Update of SAP ERP Contracts with Contract Line Item Changes in Imported Legacy Contracts

SAP Ariba Contracts supports the import of legacy contracts along with contract line items using a contract line items document (CLID). This feature updates contracts in SAP ERP systems when changes are made to contract line items in the corresponding imported legacy contracts. This is accomplished by importing the contract line number from the SAP ERP system along with other contract line item details into a contract line items document. The **Contract Item Information** worksheet of the Excel spreadsheet used to import the contract line items document has the **External System Line Number** column to import the contract line number in the SAP ERP system. This number is used internally as an identifier to match the line number to update in the SAP ERP system, when changes are made in SAP Ariba Contracts.

Prerequisites

This feature has the following prerequisites:

- Install and configure the SAP Ariba cXML Adapter. To send updated legacy contract line item data to the SAP ERP, you must install version 1.2.034 or later.
- Turn on the `cXML Version 34 Added Features` feature.
- Turn on the **Enable Contract Line Items Documents** (`Application.ACM.ContractLineItemsDocument.Enabled`) site configuration parameter. This parameter is self-service.

Importing External System Line Number into Contract Line Items Documents Using Excel Import

Prerequisites

Create a standard-capacity or large-capacity contract line items document.

Context

You can import the contract line numbers specified in external systems, when importing contract line item details into a contract line items document from external systems using the **Excel Import** option. This line number is used to identify the contract line item to update in the external system, when a line item in an imported contract line items document is changed in SAP Ariba Contracts.

Procedure

1. Click **Excel Import** and choose **Upload a file from desktop** in the contract line items document.
2. In the **Import Content from Excel** page, create an Excel template with the columns needed by clicking the **Click here to open your Contract Line Items Document in an Excel Spreadsheet** link.
3. Edit the Excel spreadsheet to add the contract line item details and enter the contract line number from the external system in the **External System Line Number** column. Save the file to your file system.
4. Choose your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
5. Choose the import option (add to the content or replace the existing content) and click **Import**.

Results

After the contract line items document and workspace are published, you can click the **Send to External System** option to send the external system line number to the SAP ERP system along with other contract line item details.

Importing External System Line Number into Contract Line Items Documents Using the Import Contract Line Items Document Web Service

Prerequisites

Create a standard-capacity or large-capacity contract line items document.

Context

You can import the contract line numbers specified in external systems when you create a contract line items document using the **Import Contract Line Items Document** web service. This line number is used to identify the contract line item to update in the external system, when a line item in an imported contract line items document is changed in SAP Ariba Contracts.

Procedure

1. Create a pricing terms Excel document with the contents for the contract line items document. In the **Contract Item Information** worksheet add the external system contract line number in the **External System Line Number** column. Save the file to your file system.
2. Encode the pricing terms document using base64 encoding.
3. Send the base64 encoded document in the `ContractContentDocumentImportRequest` from your SAP ERP system to the **Import Contract Line Items Document** web service.

   The web service converts the pricing terms document to a contract line items document with the external system line number.

Detailed Cost Breakdowns for Contract Line Item Documents (CLIDs)

You can create a CLID that contains multiple cost groups. These cost groups contain cost elements that you can define in the cost group template. You can also set the cost elements as section rollup terms in the cost group template. Cost components are the materials or line items added to cost groups. Buyers and suppliers can view, edit, delete, or add cost components from the **Cost Breakdown** popup.

Prerequisites

- Ensure that the following rules in the **Document** > **Actions** > **Line items Document** tab of the Contract Workspace (Procurement) template are set to `Yes`.
  - **Allow Cost Groups to capture detailed Cost Breakdowns** - To capture detailed cost breakdowns in the CLIDs
  - **Allow Formulas** - To configure formulas for the line items in the CLIDs
- To use cost elements in the line-item formula of a Contract Workspace (Procurement) template, the **Rollup results in section summary** option for the cost element must be set to `Yes`.
- To enable cost break analysis (CBA) for contract line items document (CLIDs), have your Designated Support Contact log a service request (SR). An SAP Ariba Customer Support representative will follow up to complete the request.

Restrictions

You cannot do the following for CLIDs with cost breakdown analysis (CBA) fields:

- Export or import templates
- Export or import excel sheets
- Comparison of cost groups in CLID

cXML Changes

To send a document with cost group information to an external system, the corresponding cXML document must include the cost group information in an extrinsic element. The cost group information includes the total cost and documentID of the cost groups.

For example, an excerpt of the cXML document that contains the cost group information is as follows:

```
<Extrinsic name="p1">
    <Money></Money>
        <DocumentInfo documentType="CostGroup" documentID="Doc20122"/>
</Extrinsic>
<!-- class: ariba.sourcing.contracts.ContractItemExtrinsicEncode -->
<!-- class: ariba.sourcing.integration.networkrfq.CostBreakDownExtrinsicEncode -->
<Extrinsic name="Raw material costs">
    <Money currency="USD">242.00</Money>
    <DocumentInfo documentType="CostGroup" documentID="Doc20123"/>
</Extrinsic>
```

Related Information

Adding Cost Group Terms to Contract Line Items Documents (CLIDs) [page 265]
Adding a Cost Component to a Cost Group in the Cost Breakdown Page of the Contract Line Items Documents (CLIDs) [page 266]
Adding Cost Elements as Section Rollup Terms in Contract Line Item Documents (CLIDs) [page 267]
Adding Cost Elements to a Line-Item Formula in Contract Line Item Documents (CLIDs) [page 268]
Sending the Contract Line Items Documents (CLIDs) for Negotiation [page 269]

Adding Cost Group Terms to Contract Line Items Documents (CLIDs)

Use this procedure to add cost group terms to contract line items documents.

Prerequisites

- Ensure that the following are set to `Yes`:
  - The `Application.ACM.ContractLineItemsDocument.Enabled` ICM parameter - To use the CLIDs
  - The **Allow Cost Groups to capture detailed Cost Breakdowns** rule in the **Document** › **Actions** › **Line items Document** tab of the Contract Workspace (Procurement) template - To capture detailed cost breakdowns in CLIDs
- Create a contract line items document as described in Creating Contract Line Items Documents (CLIDs) [page 223] in Managing Projects, Teams, Documents, and Tasks [page 10].

Context

SAP Ariba contract workspaces can contain CLIDs. A CLID, or line items document, specifies the terms of the contract, or the goods or services acquired by the contract. Each line item includes pricing information and terms, such as price and quantity.

Procedure

1. If the line items document is not already open, open it by clicking the document name and choosing **Action** › **Open**.
2. Do one of the following:
   - Edit the line item by clicking the check box to the left of its name and choose **Edit** › **Content**.

- Click the line item name and click **Action** > **Edit**.

3. In the **Item Terms** section, choose **Add Term**.
4. On the **Add Term** page, click **New** > **Term**.
5. On the **New Term** tab, enter the name of the cost term.
6. Choose **Cost Group** from the **Answer Type** pull-down menu.
7. Configure the remaining options for the new term.
8. Click OK to create the new cost group term.
9. Click the **Open cost breakdown for this line item** icon ( ) to configure the cost group term you just created.

> Note
>
> The open cost group view icon hover text in the RFP event is renamed to Enter cost breakdown for this line item.

10. Click the name of the cost group term name and click **Add** > **Line Item**. SAP Ariba displays the **Add Item** page.
11. Create line items and terms as required.
12. Click **Done**

Next Steps

Members of the **Integration Protected Fields Editor** group can modify item master data after it is added to an event or line items document. However, modifying item master data can cause validation errors. If you attempt to send the line items document contents back to the external system, the external system might reject it.

Publish the document when you have finished adding data. Only the published contents of line items documents are sent to external systems.

Adding a Cost Component to a Cost Group in the Cost Breakdown Page of the Contract Line Items Documents (CLIDs)

Use this procedure to add a cost component to a cost group in the cost breakdown page of the contract line items documents.

Prerequisites

- The contract workspace template must be configured with cost groups that contain cost elements.
- The **Allow Cost Groups to capture detailed Cost Breakdowns** rule in the **Document** > **Actions** > **Line items Document** tab of the Contract Workspace (Procurement) template must be set to `Yes`.

- The contract event must pick up templates that have cost breakdown analysis enabled and not from the default CLID templates. To ensure this,
  - The **Enable line item selection for integration** rule in the contract workspace template must be set to **No**
  - The **External System** field must be empty

Context

A cost breakdown is a consolidated list of indirect and direct expenses which buyers use to calculate the cost of an assembled product.

Procedure

1. Open the Contract Workspace (Procurement) event in your SAP Ariba Sourcing application.
2. Enter the details and select the CLID cost breakdown template. Click **Create**.
3. In the contract workspace that is created, open the document under the **Documents** section.
4. Click the **Open cost breakdown for this line item** icon ( ) that appears for the cost groups of a line item.
5. The **Cost breakdown** page appears.
6. Select a line item from the **Item** dropdown.
7. The configured cost groups for the selected line item appear in the form of tabs.
8. Select the cost group tab for which you want to add a new item.
9. A table with the cost components, cost group terms, total component cost, and total price of cost group details is displayed along with the **Add** and **Delete** buttons.
10. Click **Add**. The Add Cost component for the cost group screen appears.
11. Enter the details of the cost component and click **Add**.

Adding Cost Elements as Section Rollup Terms in Contract Line Item Documents (CLIDs)

Use this procedure to add cost elements as section rollup terms in contract line item documents.

Prerequisites

The **Allow Cost Groups to capture detailed Cost Breakdowns** rule in the **Document** > **Actions** > **Line items Document** tab of the Contract Workspace (Procurement) template must be set to **Yes**.

The Contract Workspace (Procurement) template must not be in the **Published** state.

Context

This section assumes that the contract workspace template is configured with cost groups that contain cost elements.

When a buyer configures a formula for a line item, the cost elements configured as section rollup terms are displayed in the **Contents** table. Buyers can insert the cost elements from the **Contents** table into the formula expression.

This feature helps the buyers to analyze the cost breakdown of a line item at a more granular level by allowing buyers to use the rollup value of the cost element in the line-item formula of the contract line items documents (CLIDs).

> ⓘ Note
>
> You cannot rollup cost elements like normal terms. To view the cost groups in the section rollup summary, create a custom formula. The custom formula must contain all the cost elements that are configured as section rollup terms. Then add the custom formula to the section rollup summary.

Procedure

1. In the Contract Workspace (Procurement) template, click the **Documents** tab.
2. Click **Action** > **Open** under the **Documents** section.
3. In the **Item Terms** table, click the cost element that needs to be configured as a rollup term, and choose **Action** > **Edit**.
4. Select **Yes** for the **Rollup results in section summary** option.
5. Click **OK** > **Done**.

Adding Cost Elements to a Line-Item Formula in Contract Line Item Documents (CLIDs)

Use this procedure to add cost elements to a line-item formula in contract line item documents.

Prerequisites

- The **Allow Cost Groups to capture detailed Cost Breakdowns** in the **Document** > **Actions** > **Line items Document** tab of the Contract Workspace (Procurement) template must be set to **Yes**.
- To use cost elements in the line-item formula of a Contract Workspace (Procurement) template, the **Rollup results in section summary** option for the cost element must be set to **Yes**.

Context

This feature allows you to add cost elements to a line-item formula in the contracts template.

A cost group can consist of multiple cost elements. You can configure multiple cost elements as section rollup terms by defining a formula. After you configure a cost element as a section rollup term and select the section rollup term from the **Contents** section, the value of the section rollup term is added to the total value of the cost group. This section assumes that the Contract Workspace template consists of cost groups with cost elements.

Procedure

1. In the Contract Workspace (Procurement) template, click the **Documents** tab.
2. Click **Action** > **Open** under the **Documents** section.
3. In the **Item Terms** section, do one of the following:
   - Create a new term and add a formula by selecting **Add** > **Formula**. Enter a name for the formula.
   - Select an existing term for which you want to add cost elements in the formula expression, and click **Edit**.
4. In the **Formula** field, add a formula for the term. You can insert the desired cost elements from the **Contents** table into the formula expression.
5. Click **Done**.

Sending the Contract Line Items Documents (CLIDs) for Negotiation

Use this procedure to send the contract line items documents for negotiation.

Prerequisites

The **Allow Cost Groups to capture detailed Cost Breakdowns** in the **Document** > **Actions** > **Line items Document** tab of the Contract Workspace (Procurement) template must be set to **Yes**.

Context

You can send the contract line items documents (CLID) in the Contract Workspace template for review with any of the buyer organization users. The buyer organization users may or may not be part of the contract workspace. The template must not be in the **Published** state for the negotiation to happen. The negotiation happens before the contract is sent to the supplier.

Procedure

1. In the **Documents** section of the Contract Workspace (Procurement) template, click **Action** › **Negotiation**.
2. Enter the details of the negotiation task.
3. Select the reviewers whom you want.
4. Click **OK**.

Results

The reviewer can see the negotiation task under the **Tasks** section of the template.

Deleting or Deactivating Line Items in a Contract Line Items Document Using Excel Import

Use this procedure to delete or deactivate line items in a Contract Line Items Document (CLID) using the Excel Import functionality.

Prerequisites

- Your administrator must enable the **Allow Line Item Deletion Through Excel Import** (Application.ACM.AllowLineItemDeletionThroughExcelImport) ICM parameter. For information about this parameter, see Allow Deleting Line Items Through Excel Import.
- You must have atleast one line item in the CLID that you want to modify.
- (Optional) Your site must have SAP Ariba Contracts integrated with ICI. For information about integrating SAP Ariba Contracts with ICI, see Integrating SAP Ariba Contracts with Icertis Contract Intelligence for SAP Ariba Solutions.

Context

As a buyer, to delete or deactivate line items present in the CLID of a contract workspace, you can create an Excel file that contains the required information and import the data using the **Excel Import** functionality.

Procedure

1. Open the contract workspace that contains the CLID you want to modify.
2. Open the CLID.

   The CLID details page is displayed.
3. Edit the Excel version of the CLID to prepare the data to import.

   For information about editing the Excel version of a CLID, see Editing Excel Versions of Contract Line Items Documents [page 243].

   In the **Contract Item Information** worksheet, enter a specific value in the **Item Status** column for the line items that you want to delete or deactivate. To delete a line item, enter `HardDeleted`. To deactivate a line item, enter `Deleted`.

   > ⓘ Note
   >
   > For hierarchical line items that have child line items, make note of the following:
   >
   > | Item Status (Parent Line Item) | Item Status (Child Line Item) | Result |
   > |---|---|---|
   > | `Deleted` | `Deleted` or no entry | The parent and child line items are deactivated. |
   > | `HardDeleted` | `HardDeleted` or no entry | The parent and child line items are deleted. |
   > | `Deleted` | `HardDeleted` | The parent line item is deactivated and child line item is deleted. |
   > | `HardDeleted` | `Deleted` | The parent and child line items are deleted. |

4. Return to the **Import Content from Excel** page and select **Update Document** under **Select how you would like to import the content**.
5. Click **Choose file** and select the updated Excel file.
6. Click **Import**.

Next Steps

On the CLID details page, verify that the updates to the line items are as expected.

> ⓘ Note
>
> Deleted line items are not shown in the line items table on the CLID details page. Deactivated line items are highlighted in grey in the line items table and are not editable.

Importing Deactivated Line Items From an Integrated ERP System to a Contract Workspace Using Excel Import

Use this procedure to import deactivated line items from an external integrated ERP system using the Excel Import functionality.

Prerequisites

Your administrator must enable the following ICM parameters:

- **Allow Line Item Deletion Through Excel Import** (Application.ACM.AllowLineItemDeletionThroughExcelImport). For information about this parameter, see Allow Deleting Line Items Through Excel Import.
- **Allow Importing Deactivated ERP Items Through Excel Import** (Application.ACM.AllowDeletedERPItemsThroughCLIExcelImport). For information about this parameter, see Allow Importing Deactivated Line Items From an ERP System Through Excel Import.

Context

As a buyer, to import deactivated line items from an integrated ERP system to a contract workspace that does not contain the line items information in the associated Contracts Line Items Document (CLID), you can create an Excel file with the required details and import the data using the **Excel Import** functionality.

Procedure

1. Open the contract workspace that contains the CLID you want to modify.
2. Open the CLID.

   The CLID details page is displayed.
3. Edit the Excel version of the CLID to prepare the data to import.

   For information about editing the Excel version of a CLID, see Editing Excel Versions of Contract Line Items Documents [page 243].

   In the **Contract Item Information** worksheet, enter the line item information as recorded in the ERP system. In the **Item Status** column for each line item, enter a value as `Deleted`.
4. Return to the **Import Content from Excel** page and select **Update Document** under **Select how you would like to import the content**.
5. Click **Choose file** and select the updated Excel file.
6. Click **Import**.

Next Steps

On the CLID details page of the contract workspace, verify that the updates to the line items are as expected.

> ⓘ Note
>
> Deactivated line items are highlighted in grey in the line items table and are not editable.

Assembled PDF Documents

SAP Ariba enables you to create a PDF (Portable Document Format) file that is assembled from one or more other documents. This feature enables you to:

- Quickly and easily unify a contract comprised of multiple documents into a single document. PDF documents provide a convenient way to send multiple documents for review, or approval, or electronic signature.
- Circulate documents in a secure, read-only format. Viewers cannot edit files in PDF format and cannot view previous edits made to the documents they contain.

SAP Ariba Customer Support can enable support for PDF document generation in your company's site using the `Application.ACM.PDFAssembledDocs.Enabled` parameter. By default, this feature is not enabled.

To create a viewable PDF document, you first create a PDF document. The PDF document acts as a container to which you add one or more content documents. You then generate an assembled PDF document that contains all the content documents in one PDF file.

Creating and Generating an Assembled PDF Document [page 274]

Removing Content Documents from Assembled PDF Documents [page 276]

Assembled PDF Document States [page 277]

Document Shortcuts in Assembled PDF Documents [page 277]

Limitations for Using Assembled PDF Documents [page 278]

PDF Generation Failure [page 279]

Parent topic: Management of Project Documents [page 137]

Related Information

About Project Documents [page 139]
Loading a Document from Your Desktop [page 140]
Loading a Document from Another Project to Your Project [page 143]
Controlling Document Access [page 144]
Editing Document Attributes [page 146]
Replacing a Document [page 147]

Creating and Generating an Assembled PDF Document

Use this procedure to create and generate an assembled PDF document.

Procedure

1. In a project, navigate to the **Documents** tab.
2. If the content documents you want to add to a PDF do not appear in the **Documents** tab, click **Actions** > **Upload** > **Document** to add them.
3. Select **Actions** > **Create** > **Assembled PDF**.
4. Enter a Name and Description for the PDF document and set other options.

   > ⓘ Note
   >
   > The **Is Publish Required** option has no effect for PDF documents.
5. Click **Create**. The PDF document has a status of Not Generated.
6. To add content documents to the PDF, do one of the following:
   - Navigate to the **Documents** tab and drag and drop project documents onto the PDF document.

     > ⓘ Note
     >
     > You cannot drag a drop a content document from one PDF document to another PDF document.
   - 1. Click the PDF document and choose **Action** > **View Details**.
     2. Click the **Content** tab and click **Add Document**. SAP Ariba opens an **Add PDF Content** page with a list of project documents.

3. Click the checkboxes for the documents you want to add and click **Add Document(s)**

> ⓘ Note
>
> You can add other PDF documents to a PDF document, but you cannot add the current PDF document to itself.

7. The assembled PDF document will contain its content documents in the order shown on the **Documents** tab (or under the document's **Content** tab). To rearrange the order of content documents, drag and drop the content document icons under a PDF document as shown under the **Documents** tab or under the document's **Content** tab.
8. To generate the PDF, click the PDF document and choose **Action** > **Generate PDF**. SAP Ariba generates the PDF from the content documents in the order shown.

   To update the status of the operation generating the PDF document, you must refresh the page. When PDF generation is complete, you will see the generatated PDF document in the **Documents** area of your projet with the status **Draft**.

> ⓘ Note
>
> If an error occurs during the generation of an assembled PDF document, it may be due to limitations in the Microsoft Word format. For more information, see Microsoft Word Format Limitations for Assembled PDF Documents [page 289]. Please adjust the content format accordingly and attempt to regenerate the PDF.

9. To view the generated PDF, click the PDF document, then choose **Action** > **Open Draft**.
10. To change a generated PDF document's status to Published, which is required for Signature task processing, choose **Actions** > **Publish**.

Task overview: Assembled PDF Documents [page 273]

Related Information

Removing Content Documents from Assembled PDF Documents [page 276]
Assembled PDF Document States [page 277]
Document Shortcuts in Assembled PDF Documents [page 277]
Limitations for Using Assembled PDF Documents [page 278]
PDF Generation Failure [page 279]

Removing Content Documents from Assembled PDF Documents

Use this procedure to remove content documents from assembled PDF documents.

Context

Removing a content document from an assembled PDF document only removes the content document from the assembled PDF document; it does not remove the content document from the project.

After you remove a content document from an assembled PDF document, the PDF document status will be Not Generated.

You can remove content documents from the project view or from the detailed view of the PDF document.

> ⓘ Note
>
> Do not delete documents from an assembled PDF document when it is in the Generating state. Doing so can cause the document to be in an inconsistent state. If you want to delete documents from an assembled PDF document, do so when the assembled PDF document is in the Not Generated or Draft state.

Procedure

Do one of the following:

- To remove content documents using the project view:
  1. Navigate to the **Documents** tab.
  2. Go to the list of content documents below the assembled PDF document. Drag the content document your want to remove and drop it to an area under the **Documents** tab but not under or on the assembled PDF document.
- To remove content documents using the detailed view of the PDF document:
  1. Click the PDF document and choose **Action** > **View Details**.
  2. Click the **Content** tab.
  3. Click the check boxes for the documents you want to remove and choose **Remove.**

Task overview: Assembled PDF Documents [page 273]

Related Information

Creating and Generating an Assembled PDF Document [page 274]
Assembled PDF Document States [page 277]
Document Shortcuts in Assembled PDF Documents [page 277]

[Limitations for Using Assembled PDF Documents [page 278]](#)
PDF Generation Failure [page 279]

Assembled PDF Document States

An assembled PDF document can be in one of the following states:

- Not Generated. This is the state when you first create an assembled PDF document. The assembled PDF document has not been generated, or documents have been added or removed from the assembled PDF document after it has been generated.
- Generating. The contents of the assembled PDF document are being generated.
- Draft. The contents of the assembled PDF document have been generated, but the document is not published. No new documents have been added to the assembled PDF document and no documents within the assembled PDF document have been deleted. You can open and view the contents of the assembled PDF document.
- Published. The assembled PDF document has been published (manually or automatically published after an approval task completes).
  SAP Ariba Contracts: An assembled PDF document must be in the Published state before you can add a Signature task to it.

You can create To Do, review, approval, and notification tasks for assembled PDF documents; however, because PDF documents are read-only, you cannot create Negotiation tasks for them.

SAP Ariba Contracts: You can also create signature tasks for assembled PDF documents.

You cannot create an assembled PDF document by copying an existing assembled PDF document.

Parent topic: Assembled PDF Documents [page 273]

Related Information

Creating and Generating an Assembled PDF Document [page 274]
Removing Content Documents from Assembled PDF Documents [page 276]
Document Shortcuts in Assembled PDF Documents [page 277]
Limitations for Using Assembled PDF Documents [page 278]
PDF Generation Failure [page 279]

Document Shortcuts in Assembled PDF Documents

An assembled PDF document contains one or more content documents. Each content document is a shortcut to the actual document in the contract workspace. You can drag and drop shortcuts in the PDF to control the order in which the content documents appear in the generated PDF; however, performing operations on the shortcuts has no effect on the actual documents that they reference. For example, if you remove a content document from a PDF, you remove only the shortcut to the document within the PDF—you do not remove the document from the contract workspace.

Parent topic: Assembled PDF Documents [page 273]

Related Information

Creating and Generating an Assembled PDF Document [page 274]
Removing Content Documents from Assembled PDF Documents [page 276]
Assembled PDF Document States [page 277]
Limitations for Using Assembled PDF Documents [page 278]
PDF Generation Failure [page 279]

Limitations for Using Assembled PDF Documents

A document must already exist in your project (it must be a project document) before you can add it as a content document to the assembled PDF document.

SAP Ariba Contracts: With the exception of Main Agreements and Contract Addenda, SAP Ariba Contracts can generate a PDF document from content documents in any state. Main Agreements and Contract Addenda must have at least a state of Draft for the PDF to generate. If you are creating a PDF document for a Signature task, the content documents that you add to the PDF should be completely final. For information on Signature tasks, see Management of Signature Tasks [page 354].

The supported formats for content documents include Microsoft Word, Microsoft Excel, text, and PDF.

For additional requirement and limitations and information about input file formats and fonts supported by the PDF converter, see Assembled PDF Document Specifications [page 287].

Parent topic: Assembled PDF Documents [page 273]

Related Information

Creating and Generating an Assembled PDF Document [page 274]
Removing Content Documents from Assembled PDF Documents [page 276]
Assembled PDF Document States [page 277]
Document Shortcuts in Assembled PDF Documents [page 277]
PDF Generation Failure [page 279]

PDF Generation Failure

If the PDF generation process fails (for example, because of a power failure), the `FailedPDFAssembledDocumentGenerationWork` scheduled task automatically restarts the generation process. The state of a PDF document is Generating until the scheduled task generates it.

> **Note**
>
> If the PDF generation process fails due to the formatting limitations in the document, refer to Microsoft Word Format Limitations for Assembled PDF Documents [page 289]. Adjust the content format as necessary and attempt to generate the PDF again.

Parent topic: Assembled PDF Documents [page 273]

Related Information

Creating and Generating an Assembled PDF Document [page 274]
Removing Content Documents from Assembled PDF Documents [page 276]
Assembled PDF Document States [page 277]
Document Shortcuts in Assembled PDF Documents [page 277]
Limitations for Using Assembled PDF Documents [page 278]
How to Create and Generate an Assembled PDF Document [page 274]
How to Remove Content Documents From Assembled PDF Documents [page 276]

Using Document Choice to Create Events or Documents

This procedure describes how to use document choice to create events or documents.

Context

Your template administrator can create document choice documents for you. These are documents that allow you to select a document (or event, if you are working on an SAP Ariba Sourcing project) to create from a list of documents. Document choice documents are shown with your other project documents below the **Documents** tab.

> **Note**
>
> When you create an event using document choice, the tasks present in the template are not added to the event.

Procedure

1. Click on the name of the document choice document and choose **Open**.

   A **Create New Document** or **Create New Event** page opens.
2. Change the **Title** field as needed. Enter a description and modify other document fields (such as **Currency** and **Commodity**, if you are creating an event) as needed.
3. If you are using a document choice with events in an SAP Ariba Sourcing project:
   - Choose a setting for **Test Event**. You can use this setting to include or exclude the event from reports.
   - Choose a value for **Event Type**. The events you can create are constrained by this value.
4. Choose the document (or event) you want to create. Click **Create**.

Task overview: Management of Project Documents [page 137]

Related Information

About Project Documents [page 139]
Loading a Document from Your Desktop [page 140]
Loading a Document from Another Project to Your Project [page 143]
Controlling Document Access [page 144]
Editing Document Attributes [page 146]
Replacing a Document [page 147]
Creating a Shortcut in Another Project to a Document in the Current Project [page 149]
Creating a Shortcut to an External Document (Shortcut Here) [page 150]
Extracting ZIP File Contents [page 152]
Downloading Project Attachments to a ZIP File [page 153]
Using DFS to Synchronize Local Document Changes with Project Documents [page 155]
Viewing and Managing Project Document Versions [page 156]
Management of Documents Using the Documents Tab [page 159]
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Use of Savings Forms to Track Savings [page 166]
Contract Line Items Documents (CLIDs) [page 178]
Assembled PDF Documents [page 273]
Microsoft Word Integration with SAP Ariba [page 280]
Desktop File Sync (DFS) [page 284]
Assembled PDF Document Specifications [page 287]

Microsoft Word Integration with SAP Ariba

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Use of Microsoft Word with SAP Ariba

About Using Microsoft Word with SAP Ariba

SAP Ariba solutions are integrated with Microsoft Word, which enables users to seamlessly edit Word documents in projects. When Desktop File Synchronization (DFS) is enabled and a user opens a Word document in a project, SAP Ariba invokes Word on the user's system and loads the document for the user. If the user does not have the most recent version of the document, SAP Ariba automatically downloads it to the user's local system.

In addition, SAP Ariba solutions provide the following Word integration features when DFS is enabled:

- The **Compare Versions** operation, which is selected from the **Version History** tab of the detailed view of a document. This operation enables you to compare a document with changes from the previous version with the changes highlighted inline.

- The **Merge Document** operation, which is selected from the **Action** menu for a document. This operation merges a document with another Word document in a project. The merged document shows the changes highlighted inline.
- The **Review Change** operation, which is available when working with review and approval tasks. This operation enables you to view changes from reviewers and accept or reject individual changes within the file.

When these options are selected in the SAP Ariba user interface, SAP Ariba invokes Word on the user's system. Word then performs a combine or merge operation to merge the documents and uses the Word Track Changes feature to highlight the changes in the documents.

> ⚠ Limitations
>
> All Word operations are performed using an instance of Word that runs on the user's system; Word is not executed on the SAP Ariba server system.
>
> When comparing or viewing merged Word documents, all changes and revisions are shown inline. SAP Ariba does not support the Word option to show revisions using balloons.

Microsoft Word Requirements for DFS

When using Microsoft Word integration features with SAP Ariba Desktop File Synchronization (DFS), users must meet the following requirements:

- Use Word 2007 or Later
  The Word version must be Word 2007 or later. If you have documents written in Word 97 or earlier, you can use the procedure described in Preparing Clean Versions of Word Documents to create clean versions of these documents in Word 2007 or later.
- Use the Same Word Version
  All users editing a Word document (creating, modifying, or reviewing a Word document with edit access) must use the same version of Word. This is a requirement regardless of the document extension type (`.doc` or `.docx`). For example, saving a file with a `.doc` extension in Word 2010 does not ensure that all operations will be successful in Word 2007.
  It is possible to edit a document using a Word version that is higher than the version used to create it, but all subsequent authors must edit the document using the higher Microsoft version level. For example, a document created with Word 2007 can be edited by a Word 2010 user (in compatibility mode), but if a Word 2007 user subsequently attempts to edit the document, errors can occur or the action can fail.
  If a document is only opened and viewed (but not saved) using a version of Word that is higher than the version used to create it, users can continue to edit the document using the (lower) version used to create it. For example, the following sequence of events can complete with no problems:
  - A Word 2007 user creates a document.
  - A Word 2010 user views the document and does not save or create a new version.
  - A Word 2007 user edits the document.
- Do Not Merge Documents from Reviewers Who Use a Higher Word Version
  Task owners cannot process reviewed documents from reviewers who use a Word version that is higher than the task owner's version.
  Microsoft does not support or provides limited support for merging a document into a document that was created using a lower Word version. When processing a document reviewed by an external email reviewer (such as a supplier), a task owner submits the reviewed document on behalf of the reviewer. As part of the submittal

process, the reviewed document is merged with the current version of the document. Because this merge is performed and because of Microsoft limitations when merging Word documents, task owners cannot merge documents from reviewers who use a higher Word version. A task owner must be using a version of Word that is the same or higher than the version used by the external email reviewer.
For example, a task owner using Word 2016 can process documents reviewed using the following versions of Word:
- Word 2013
- Word 2010
- Word 2007
  However, a task owner using Word 2007 cannot process documents reviewed using Word 2010.
  If a task owner is not using the most recent version of Word and cannot ensure that an external email reviewer uses a version of Word that is the same or lower, SAP Ariba recommends that the task owner creates a clean copy of the reviewed document and then submits the cleaned version. This procedure is described in Preparing Clean Versions of Word Documents.

- Do Not Install Multiple Versions of Word on a System
  Users cannot have multiple versions of Microsoft Word installed on their systems. The presence of multiple versions in the system registry can cause runtime problems with the Microsoft APIs.

Removing the Microsoft Word Converter MSWord6.wpc

If you are using Word 2007 or Word 2010, remove the Microsoft Word converter MSWord6.wpc (mswrd632) from your system registry. If you do not remove this converter from your registry, you might have problems using the Review Changes feature or when using the Clause Library (the Clause Library is an SAP Ariba Contracts feature).

The registry entry to remove is as follows:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Shared Tools\Text
Converters\Import\MSWord6.wpc
```

Refer to the Microsoft documentation for instructions on removing system registry entries. In addition, the following Microsoft support article related to the security update MS09-073 includes a link (`Fix this problem`) to remove the entry for you and instructions for removing the entry manually:

http://support.microsoft.com/kb/973904

Note that the security update MS09-073 is not related to SAP Ariba. MS09-073 and SAP Ariba are similar in that users with either MS09-073 or SAP Ariba installed can experience problems if the MSWord6.wpc converter is not removed.

Merging Word 2003 and Word 2007 Documents

SAP Ariba solutions support the use of Word 2007; however, if you must merge documents created in Word 2003 with documents created in Word 2007, you should perform the merge in Word 2007 and not any other version of the product. This is due to a Microsoft restriction. For additional information, contact Microsoft.

Related Information

[Preparing Clean Versions of Word Documents [page 284]]

Preparing Clean Versions of Word Documents

Use this procedure to prepare clean versions of Word documents.

Context

Microsoft Word documents contain embedded data used for formatting and other operations. The embedded data can vary depending on the Microsoft Word version used, and opening a document created using one version of Microsoft Word with a newer version of Microsoft Word does not update all the embedded data to the newer version.

Use this procedure to prepare a clean version of a Word document if:

- You are loading an SAP Ariba Contracts assembled contract document.
- You need to view or incorporate a reviewed document from a reviewer using an unknown or higher version of Word than your version
- You need to review or load a Word document created using Word 97 (or earlier).

Procedure

1. Open the file using Word.
2. Select all the text (**CTL+A**) and copy it to your Microsoft Office clipboard (**CTL+C**).
3. Close Word.
4. Paste the text from your Office clipboard (**CTL+V**) into a plain text editor, such as Microsoft Notepad.
5. Select all the text (**CTL+A**) from the plain text editor and copy it to your Office clipboard (**CTL+C**).
6. Start a new instance of Word and create an empty file.
7. Paste the text from your Office clipboard (**CTL+V**) into the new Word file.
8. Remove any password protection for the document. SAP Ariba cannot synchronize changes made in password-protected documents.

Desktop File Sync (DFS)

> ⓘ Note
>
> For contract authoring, we recommend that you use **Enhanced Contract Authoring** or integrate your SAP Ariba Contracts instance with Icertis Contract Intelligence (ICI) for SAP Ariba solutions. For more information

> about these solutions, refer to Enhanced Contract Authoring and Integrating SAP Ariba Contracts with Icertis Contract Intelligence for SAP Ariba Solutions, respectively.

You can enable Desktop File Sync (DFS) before working with documents in projects. DFS automates the uploading and downloading of files in SAP Ariba and allows you to check document version compatibility.

You can enable DFS to use any of the following features:

- Exporting tasks to Microsoft Outlook
- Comparing versions of documents in Microsoft Word
- Automatic downloading of project documents from SAP Ariba to your local file system when you open them in SAP Ariba
- Assisted uploading of project documents to SAP Ariba after you save a new version on your local file system (see How to Upload Document Changes From Your Desktop With DFS Enabled [page 155])
- Comparing versions of Microsoft Word documents that are maintained by SAP Ariba
- Automatic uploading of your changes when reviewing a document with edit access for reviewers enabled
- SAP Ariba Contracts Professional features, including:
    - the ability to create assembled contract documents (Main Agreement and Contract Addendum documents)
    - the Microsoft Track Changes feature is enabled for assembled contract documents by default
    - the Clause Library
    - parsing contract documents to upload clauses and sections
    - parsing contract documents with bookmarks
    - automatically populating document properties fields in contract documents from field values in a contract workspace

You do not have to enable DFS to export project information to Microsoft Project or Microsoft Excel.

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Enabling Desktop File Sync (DFS)

Use this procedure to enable Desktop File Sync.

Procedure

1. If you are creating an SAP Ariba Contracts workspace or opening a project for which you are a member of the project owner group, a Desktop File Sync reminder appears you if you do not have DFS enabled.

   The DFS reminder gives you the option of enabling DFS, ignoring the reminder for your current session in SAP Ariba, or disabling it permanently. You will only see the reminder if you do not have DFS enabled and have not disabled the reminder.

   Click **Enable DFS**.

   If you do not see the Desktop File Sync reminder, navigate to Desktop File Sync Preferences by doing one of the following:

   - In the Desktop File Sync reminder dialog box, click **Enable DFS**.
   - In the upper right corner of the dashboard, click your name and select **Preferences** > **Change Desktop File Sync**.
     On the **Desktop File Sync Preferences** page, click **Enable**.
2. Click **Next** to install the ActiveX controls required for DFS.
3. Click **Browse** and navigate to the folder you want to use as the Desktop Directory.

   The Desktop Directory is the local file directory in which SAP Ariba synchronizes files. It is the only directory in which DFS looks for or places files. The `My Documents` directory is the default choice.
4. Click Done.

Preserving DFS Settings for Your Browser

Use this procedure to preserve DFS settings for your browser.

Context

The browser cookie that stores your DFS settings is associated with the main SAP Ariba sign in page. If the URL you use to access SAP Ariba does not link to the main sign in page, your DFS settings might change when you close the browser and then sign back into SAP Ariba. For example, the URL in your SAP Ariba welcome email links to the page for resetting passwords, and looks something like this:

```
            https://mycompany.sourcing.ariba.com/Sourcing/Main/ad/loginPage/
SSOActions?
awsso_cc=passwordadapter%3AUGFzc3dvcmRAQUNN%3Bawsso_arid%3AMTIwNTk1MjU3MjY2MA%3D%3D%
3Bawsso_ku%3AaHR0cHM6Ly9zMS5hcmliYS5jb20vU291cmNpbmcvTWFpbi9hZC9jbGllbnRLZWVwQWxpdmU
vU1NPQWN0aW9ucw%3D%3D%3Bawsso_fl%3AMQ%3D%3D&awsso_ap=ACM&awsso_hpk=true&passwordadap
ter=PasswordAdapter1&realm=mycompany&awsr=true
```

To save a URL to your company's SAP Ariba site in your browser's Favorites or bookmarks:

Procedure

Delete any text after `ariba.com/` in the URL. For example:

`https://mycompany.sourcing.ariba.com/`

Assembled PDF Document Specifications

Size Limitations

The maximum size of documents added as content to assembled PDF documents (input documents to be converted to PDF) is limited to 10 MB (approximately 1800 pages of text). This limitation does not apply to the size of PDF content documents that you add to a PDF container—you can add PDF content documents of any size.

Input File Format Limitations

The PDF converter can create assembled PDF documents from numerous types of input files, including:

- Microsoft Word (DOC and DOCX)

- Microsoft Excel (XLS only)
- Rich Text Format (RTF)
- Text (TXT)
- Hypertext Markup Language (HTML)
- Portable Document Format (PDF)

The PDF converter does not support all input file formats. The following list contains descriptions of file types that are known to be difficult to convert, but is not an exhaustive list:

- Excel files with multiple tabs, and images and pivot tables embedded. If an Excel file contains multiple tabs, the converter processes the tabs from left to right and places data from successive tabs below previous tabs.
- Documents with elements that extend horizontally beyond one page are difficult to convert, such as Excel files with many columns, or with very large images. If an Excel file contains many columns, the converter might strip columns to the right of the page boundary.
- Documents with images that extend beyond one page.

Microsoft Word Format Limitations for Assembled PDF Documents [page 289]

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Microsoft Word Format Limitations for Assembled PDF Documents

The following is a list of Microsoft Word formatting features that the PDF converter does not support, but is not an exhaustive list:

- WordArt
- form fields
- comments (placement might not match source document)
- text embossing, engraving, shadowing, shading
- Text Direction

> ⓘ Note
>
> The PDF converter does not support multiple Microsoft Word documents with signatures; to create an assembled PDF document, select one document (with a signature) at a time.

The following table lists Microsoft Word formatting features and indicates if they are supported by the PDF converter.

Feature	Status	Notes and Restrictions
Characters		
Character style	Supported	
Breaks, line breaks, page breaks	Supported	
Hard page break	Supported	
Hard line break	Supported	
Hard column break	Supported	
Font name, size	Partially supported	Some fonts are not supported in PDF. See Included Fonts [page 293] for a list of supported fonts.
Font Color	Supported	
Highlight Color	Supported	
Symbol font	Partially supported	Some symbols are not supported in PDF.
All caps	Supported	
Small Caps	Not supported	
Emphasis (bold, italic, underline)	Supported	
Underline style	Partially supported	All underline styles are not supported.
Superscript	Supported	
Subscript	Supported	
Strikethrough	Supported	
Double-Strikethrough	Partially supported	Appears as solid line.
Hidden text	Supported	

Feature	Status	Notes and Restrictions
Chinese/Japanese/Korean (CJK) fonts	Partially supported	Requires the CJK font to be installed. See Included Fonts [page 293] for a list of supported fonts.
Unicode	Partially supported	Some characters not rendering without appropriate fonts with unicode character mappings.
Embossed, Engraved, Shadow	Not supported	
Text Direction	Not supported	
Character Spacing/Kerning	Supported	
Character Spacing Scale	Not supported	
Revisions	Not supported	N/A.
Paragraphs		
Paragraph style	Supported	
Bookmarks	Supported	
Line spacing	Supported	
Indentation (right, left, first line)	Supported	
Space before, after	Supported	
Alignment (left, center, right, justify)	Supported	
Paragraph Border	Partially supported Simple borders are supported but border styles are not supported.	
Absolutely Positioned Paragraphs	Supported	
Tabs	Supported	All tabs styles are supported but tab placement might not be aligned.
Comments	Partially supported	Comment appears as normal text and comment text position might not match the source document.
Line numbering	Supported	
Background color	Partially supported	Supported only at full paragraph, not inline.
Document Properties		
Regular Properties (Title, Subject, Author, Kewords, etc.)	NA	
Custom Properties	NA	
Passwords	NA	
Styles		
Style properties (Paragraph, Character)	NA	
Styles (Table, List)	Supported	
Sections		

Feature	Status	Notes and Restrictions
Sections	Supported	
Section properties	Supported	
Columns	Supported	
Column background color	Supported	
Page size and orientation	Supported	
Page margins	Supported	
Section breaks	Supported	
Continuous Section breaks	Supported	
Images		
Images	Supported	
Image properties	Partially supported	Rotation to a specific angle is not supported
Image borders	Supported	Only simple line border is supported
Absolute Positioning of Images	Partially supported	Images are not at absolute position.
Cropping of images	Supported	
Image types		
	Image Type	**Status**
	Raster images (PNG, JPG, BMP, TIF)	Supported
	Image Format Conversion	Supported
	Vector graphics (WMF/EMF)	Supported
	Drawn Objects (Word Shapes)	Partially supported - PNG images for shapes/ shapegroups are rendered. Very limited support for shapes; shapes drawn using pencil are not supported.
	WordArt	Not supported
	OLE Objects - field embedded images (EMBED) (Word.Picture.8, Word.Document.8, Excel.Chart.8, Excel.Sheet.8, MSGraph.Chart.8, Visio.Drawing.6, Paintbrush, MSPhotoEd.3, Unknown)	Supported
	Word Equations	Partially supported - The equation is exported as a single image. The objects comprising the equations cannot be accessed as individual components.
	Field include picture (INCLUDEPICTURE) for Externally Linked Images	Supported for GIF, JPEG, and PNG.
	Picture Field shapes (SHAPE)	Supported
Text Boxes / Frames	Partially supported	Frame is not in absolute position at some cases.
Horizontal Rules	Supported	

Feature	Status	Notes and Restrictions
Tables		
CALs table model	N/A	
Table wrap around text	Partially supported	Wrapping on left or right supported but not supported for both left and right at same time.
Table Features		
	Table Feature	**Status**
	Column definitions	Supported
	Table alignment (left, center, right)	Supported
	Border width	Supported
	Border color	Supported
	Tables within tables	Supported
Row Features		
	Row Feature	**Status**
	Header row	Supported
	Keep-together, keep-with-next	Supported
	Row height	Supported
Cell Features		
	Cell Feature	**Status**
	Cell width	Supported
	Cell vertical alignment (top, middle, bottom)	Supported
	Cell padding	Supported
	Cell shading	Supported
	Row span	Supported
	Column span	Supported
	Border colors	Supported
	Border width (top, bottom, left, right)	Supported
	Border Style	Partially supported - only solid borders are supported.
Lists		
Bulleted labels	Supported	
Numbered labels	Supported	
List type (ordered/unordered)	Supported	
List level	Supported	
List value	Supported	

Feature	Status	Notes and Restrictions
Lists where elements are not to-gether	Supported	
Lists within lists	Supported	
Lists within Tables	Supported	
Custom Bullets	Partially supported	Some symbol bullets are not supported.
Fields		
Field tag element	NA	
Fields, Links	Partially supported	Some fields are not rendered
Hyperlink		
	HYPERLINK TYPE	STATUS
	Internal document links (bookmarks)	Supported
	External links (URLs	Supported
	Email (mailto)	Supported
Form Fields	Not supported	
Headers/Footers		
Header/Footer	Supported	
Header/Footer tag element	NA	
Header properties (even, odd, etc.)	Supported	
Footer properties (even, odd, etc.)	Supported	
Footnotes/Endnotes		
Footnotes, Endnotes	Not supported	
Reference field (NOTEREF)	NA	
Footnote/Endnote reference	Not supported	
Footnote/Endnote label	Supported	

Included Fonts

The converter that creates assembled PDF files includes the fonts in the following list. If you create an assembled PDF file from a document that uses a font that is not listed, the converter will attempt to substitute it with another font. If the substituted font has different spacing or sizing, page breaks and other formatting in the assembled PDF file might not match the source document.

Each entry in the following list specifies a font triplet consisting of the font name, weight attribute, and style attribute.

```
"3 of 9 Barcode,any" normal normal
"Agency FB,any" normal normal
"Agency FB,any" normal bold
"Aharoni,Bold" normal normal
```

```
"Algerian" normal normal
"Andalus" normal normal
"AngsanaUPC" normal normal
"AngsanaUPC,Bold" normal normal
"AngsanaUPC,BoldItalic" normal normal
"AngsanaUPC,Italic" normal normal
"ArabicTransparent" normal normal
"ArabicTransparent,Bold" normal normal
"Arial Black,any" normal normal
"Arial Black,any" normal normal
"Arial Black,any" italic normal
"Arial Black,sans-serif" normal normal
"Arial Bold,sans-serif" normal bold
"Arial Narrow,any" normal normal
"Arial Narrow,any" italic bold
"Arial Narrow,any" italic normal
"Arial Narrow,any" normal bold
"Arial Narrow,sans-serif" normal normal
"Arial Narrow,sans-serif" normal bold
"Arial Rounded MT Bold,any" normal normal
"Arial,sans-serif" normal normal
"Arial,sans-serif" italic bold
"Arial,sans-serif" italic normal
"Arial,sans-serif" normal bold
"Baskerville Old Face,any" normal normal
"Bauhaus 93,any" normal normal
"Bell MT,any" normal normal
"Bell MT,any" italic normal
"Bell MT,any" normal bold
"Berlin Sans FB Demi,any" normal normal
"Berlin Sans FB,any" normal normal
"BerlinSansFB,Bold" normal normal
"Bernard MT Condensed,any" normal normal
"Blackadder ITC,any" normal normal
"Bodoni MT Black,any" normal normal
"Bodoni MT Black,any" italic normal
"Bodoni MT Condensed,any" normal normal
"Bodoni MT Condensed,any" italic bold
"Bodoni MT Condensed,any" italic normal
"Bodoni MT Condensed,any" normal bold
"Bodoni MT Poster Compressed,any" normal normal
"Bodoni MT,any" normal normal
"Bodoni MT,any" italic bold
"Bodoni MT,any" italic normal
"Bodoni MT,any" normal bold
"Book Antiqua,any" normal normal
"Book Antiqua,any" italic bold
"Book Antiqua,any" italic normal
"Book Antiqua,any" normal bold
"Bookman Old Style,any" normal normal
"Bookman Old Style,any" italic bold
"Bookman Old Style,any" italic normal
"Bookman Old Style,any" normal bold
"Bradley Hand ITC,any" normal normal
"Britannic Bold,any" normal normal
"Broadway,any" normal normal
"Browallia New,any" normal normal
"Browallia New,any" italic bold
"Browallia New,any" italic normal
"Browallia New,any" normal bold
"BrowalliaUPC" normal normal
"BrowalliaUPC,Bold" normal normal
"BrowalliaUPC,BoldItalic" normal normal
"BrowalliaUPC,Italic" normal normal
"Brush Script MT,any" normal normal
"Californian FB,any" normal normal
"Californian FB,any" italic normal
"Californian FB,any" normal bold
```

```
"Calisto MT,any" normal normal
"Calisto MT,any" italic bold
"Calisto MT,any" italic normal
"Calisto MT,any" normal bold
"Castellar,any" normal normal
"Centaur,any" normal normal
"Century Gothic,any" normal normal
"Century Gothic,any" italic bold
"Century Gothic,any" italic normal
"Century Gothic,any" normal bold
"Century Schoolbook,any" normal normal
"Century,any" normal normal
"CenturySchoolbook,Bold" normal normal
"CenturySchoolbook,BoldItalic" normal normal
"CenturySchoolbook,Italic" normal normal
"Chiller,any" normal normal
"Colonna MT,any" normal normal
"Comic Sans MS,any" normal normal
"Comic Sans MS,any" normal bold
"Cooper Black,any" normal normal
"Copperplate Gothic Bold,any" normal normal
"Copperplate Gothic Light,any" normal normal
"Cordia New,any" normal normal
"Cordia New,any" italic bold
"Cordia New,any" italic normal
"Cordia New,any" normal bold
"CordiaUPC" normal normal
"CordiaUPC,Bold" normal normal
"CordiaUPC,BoldItalic" normal normal
"CordiaUPC,Italic" normal normal
"Courier New,monospace" normal normal
"Courier New,monospace" italic bold
"Courier New,monospace" italic normal
"Courier New,monospace" normal bold
"Curlz MT,any" normal normal
"David" normal normal
"David,Bold" normal normal
"DavidTransparent" normal normal
"DilleniaUPC" normal normal
"DilleniaUPC,Bold" normal normal
"DilleniaUPC,BoldItalic" normal normal
"DilleniaUPC,Italic" normal normal
"Edwardian Script ITC,any" normal normal
"Elephant,any" normal normal
"Elephant,any" italic normal
"Engravers MT,any" normal normal
"Eras Bold ITC,any" normal normal
"Eras Demi ITC,any" normal normal
"Eras Light ITC,any" normal normal
"Eras Medium ITC,any" normal normal
"EstrangeloEdessa" normal normal
"EucrosiaUPC" normal normal
"EucrosiaUPC,Bold" normal normal
"EucrosiaUPC,BoldItalic" normal normal
"EucrosiaUPC,Italic" normal normal
"Felix Titling,any" normal normal
"FixedMiriamTransparent" normal normal
"Footlight MT Light,any" normal normal
"Forte,any" normal normal
"FrankRuehl" normal normal
"Franklin Gothic Book,any" normal normal
"Franklin Gothic Book,any" italic normal
"Franklin Gothic Demi,any" normal normal
"Franklin Gothic Demi,any" italic normal
"Franklin Gothic Heavy,any" normal normal
"Franklin Gothic Heavy,any" italic normal
"Franklin Gothic Medium Cond,any" normal normal
"Franklin Gothic Medium,any" normal normal
```

```
"Franklin Gothic Medium,any" italic normal
"FranklinGothicDemiCond" normal normal
"FreesiaUPC" normal normal
"FreesiaUPC,Bold" normal normal
"FreesiaUPC,BoldItalic" normal normal
"FreesiaUPC,Italic" normal normal
"Freestyle Script,any" normal normal
"French Script MT,any" normal normal
"Garamond,any" normal normal
"Garamond,any" italic normal
"Garamond,any" normal bold
"Gautami,any" normal normal
"Georgia,any" normal normal
"Georgia,any" italic bold
"Georgia,any" italic normal
"Georgia,any" normal bold
"Gigi,any" normal normal
"Gill Sans MT Condensed,any" normal normal
"Gill Sans MT,any" normal normal
"Gill Sans MT,any" italic bold
"Gill Sans MT,any" italic normal
"Gill Sans MT,any" normal bold
"Gill Sans Ultra Bold Condensed,any" normal normal
"Gill Sans Ultra Bold,any" normal normal
"GillSansMTExtCondensedBold" normal normal
"Gloucester MT Extra Condensed,any" normal normal
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Management of Tasks

Use tasks to assign actions to be completed, such as reviewing or approving documents. For information about how to manage tasks in the SAP Ariba Procurement mobile app, see SAP Ariba Procurement Mobile App Guide.

About Tasks

Use tasks to assign actions to be completed, such as reviewing or approving documents.

A task is an action assigned to a user to be completed, such as completing a form or reviewing or approving a document. Tasks can be organized in phases, so that a task or group of tasks is activated in a specific order. For more information about phases, see Using Phases to Organize Tasks [page 392].

Projects can be created with a default set of tasks that are defined in the project template. When a user is assigned a task, the system:

- Adds the task to the user's **My Tasks** page

- Adds the task to the user's calendar. The task status can indicate an action required by the user.
- Sends an email notification to the user.
- If a task has a due date or end date specified, SAP Ariba also adds the task to the user's **To Do** portlet.

After a task for which you are the owner is completed, it remains in the To Do portlet for seven days by default. For information about this value, refer to Application.ACM.MinDaysCompletedTasksStayOnToDoPortlet [page 431].

If users are assigned a task from an SAP Ariba Contracts workspace, the task is removed from their **To Do** portlet when the workspace is published.

If tasks are associated with inactive suppliers, they become read-only and users can no longer complete them.

SAP Ariba sends email notifications to all the members of the task owner group if the self-service configuration parameter `Application.ACM.SendEmailNotificationToTaskOwnerGroup` is set to its default value (**True**). For more information, see the Send email notifications to all members of the task owner group.

As users work on a task, the task status changes. The current status of each task in a project is visible on the **Tasks** tab in the project, so all team members are aware of the project's progress.

Related Information

- If you are a SAP Ariba Supplier Information and Performance Management user, you can also work with tasks for supplier workspace for supplier organizations. Tasks for supplier workspaces are described in Working with Projects and Documents.
- If you are responsible for completing a To Do task or reviewing, approving, negotiating, or signing a document in a task, see Searching, Completing Tasks, and Other Common User Actions for information on performing these tasks.
- If you are a template author, see the Project Template Guide for additional information about creating tasks in templates.

Task Types [page 301]

Task Owners and Participants [page 307]

Additional Task Features [page 310]

Task Types

Use tasks to assign actions to be completed, such as reviewing or approving documents.

A project can contain the following types of tasks:

- To Do
- Notification
- Document
    - Review tasks
    - Approval tasks
    - Negotiation tasks

- Publish Document tasks
- Signature tasks (available only in SAP Ariba Contracts projects)

What Are To Do Tasks? [page 302]

What Are Notification Tasks? [page 302]

What Are Document Tasks? [page 303]

What Are Review Tasks? [page 304]

What Are Approval Tasks? [page 305]

What Are Negotiation Tasks? [page 305]

What Are Publish Document Tasks? [page 306]

What Are Signature Tasks? [page 306]

Parent topic: About Tasks [page 300]

Related Information

Task Owners and Participants [page 307]
Additional Task Features [page 310]

What Are To Do Tasks?

To Do tasks are intended for simple tasks without two-way communication or cyclical workflows. You can use To Do tasks to remind users to take some action outside of the project, such as compiling a list of potential business contacts. After you complete the task, you must manually mark it as complete.

You can associate a To Do task with a project, document, or folder, but To Do tasks do not have features to help users review and incorporate document changes from other users. Only one user needs to participate in a To Do task; the task owner is also the person who completes the task.

For more information about working with To Do tasks, see Managing To Do Tasks [page 315].

What Are Notification Tasks?

Notification tasks enable you to send notification email messages to SAP Ariba solution users and Business Contacts (external users). You can configure a notification task to send an email message once or to send multiple, recurring rounds of the message at scheduled intervals. The schedule for sending the notification email messages can be based on a fixed date, the start of the parent phase, or linked to a project date field.

Notification tasks are unique because they can continue to occur regardless of a project's state. For example, notification tasks can continue to occur after a SAP Ariba Sourcing project ends or after an SAP Ariba Contracts workspace is published.

Notification tasks are intended to help users manage projects by sending email reminders and are not intended to help users collaborate while authoring documents. Although you can associate a notification task with a project document (or with the entire project), SAP Ariba does not include a copy of the document in the email notifications by default. If you would like to include a copy of the document in email notifications sent to internal users (recipients with an SAP Ariba user account), SAP Ariba can set the `Application.ACM.SendEmailAttachmentToNotificationRecipient` [page 444] site configuration parameter for you.

For more information about working with notification tasks, see Management of Notification Tasks [page 385].

Notification Tasks in SAP Ariba Contracts Workspaces

In SAP Ariba Contracts workspaces, notification tasks can continue after a workspace is published, closed, or expired. Notification tasks can also occur when a contract workspace is on hold. If a contract workspace is published, users can complete and create notification tasks without amending the contract workspace. Notification tasks can help you maintain contracts that are already published; by comparison, review, approval, and negotiation tasks are intended to help you execute and publish a contract.

You can use notification tasks in addition to notice period and expiration emails to help you manage checkpoints, recurring reviews, or other ongoing activities that need to be performed regardless of a contract's state

What Are Document Tasks?

A document task is a task that is linked to a document or folder. Document tasks can be:

- Review tasks
- Approval tasks
- Negotiation tasks
- Publish Document tasks
- Signature tasks (for SAP Ariba Contracts workspaces)

A document task is associated with a single document or folder only. You can associate multiple documents with a review, approval, or negotiation task by placing the documents in a folder. The document task operates on the folder as a single entity.

Most document tasks can also be linked to projects, with the exception of SAP Ariba Contracts signature tasks, which cannot be linked to projects. The task operates on the project as a single entity.

Document tasks include the following features to help users solicit and incorporate document changes and comments from other users:

- Temporary access to the document. SAP Ariba grants access to all internal approvers (or reviewers) when the approver has access to the task (any predecessor approvers have approved or reviewed the document). This access is granted even if the internal approvers (or reviewers) would not otherwise have access to the documents.
- SAP Ariba automatically sends email messages with copies of the documents to users assigned to review or approve documents.

If the task is created for a document, external reviewers (reviewers who do not have an SAP Ariba sign in) will receive a copy of the document regardless of any access controls set for the document.

- Document reviewers and approvers can send back or submit modified documents. The person processing the modified documents (usually the task owner) always has the ability to select which document changes to accept or deny.
- Document reviewers, approvers, and the task owner can also add comments and supporting documents for the task; SAP Ariba keeps this information with the task for all task participants to view.

Document Tasks Created for Folders

If a document task is created for a folder, internal reviewers (or approvers) are granted temporary access to the folder but access controls on documents or subfolders in the folder are enforced. For example, there is a folder `private_folder` with the **Owner Only** access control set. This folder contains the following items:

- `public_doc` (a document with no access control set)
- `private_doc` (a document with the **Owner Only** access control set)
- `private_subfolder` (a subfolder with the **Owner Only** access control set)

If you create a review task for `private_folder`, an internal reviewer who is not the owner of `private_folder` or any of its contents will have the following access rights:

- access to `public_doc`, even though the reviewer does not have access rights to `private_folder`
- no access to `private_doc` or `private_subfolder`

The email notification sent to internal reviewers (or approvers) will contain copies of all document and documents in subfolders to which they are granted temporary access.

The email sent to external reviewers (reviewers who do not have an SAP Ariba sign in) will only contain copies of files in the folder or subfolders that have no access control.

Signature Tasks Created for Folders

If a signature task is created for a folder, only the child documents and documents in subfolders that are visible to the task submitter are sent to the electronic signature provider for processing.

What Are Review Tasks?

Review tasks are intended to solicit and incorporate review comments for project documents.

Review tasks support the following key features:

- External reviewers. Reviewers can be external reviewers, who are external users that do not have SAP Ariba sign in accounts. SAP Ariba emails the review documents to the external users and provides features to submit and track their reviews. For more information, see External Reviewers [page 322].

- Edit access. Review task owners can grant internal reviewers edit access. This allows internal reviewers (users with access to the SAP Ariba system) to directly modify the document and create a new version in the system. For more information, see Reviewers with Edit Access [page 321].

For more information about working with review tasks, see Management of Review Tasks [page 320].

What Are Approval Tasks?

Approval tasks are intended to get approvals for project documents. SAP Ariba Supplier Management users can also use approval tasks for organizations. Approval tasks are similar to review tasks with the following key differences:

- Approval tasks can be approved, or completed, only by the approvers. If an approver denies approval, the task owner must create a new approval round and the new round must be approved to complete the task.
- All approvers must be SAP Ariba users. External approvers are not allowed.
- Approvers cannot be granted edit access. If an approver does not already have edit access to a document, the approver cannot modify the document in the system. However, approvers denying approval can include modified documents in their responses. The user processing a denial can review and incorporate changes from the approver and submit a new version of the document for a new approval round.

Creating both a review task and an approval task for a document enables you to assign one group of users to review the document and another group to approve the document; it also provides a structure that models a typical workflow for better tracking and analysis.

For more information about working with approval tasks, see Management of Approval Tasks [page 336].

What Are Negotiation Tasks?

Negotiation tasks are intended to record the negotiations for a document between two or more parties, such as your company and an external supplier or buyer.

Although negotiation tasks include features that enable the task owner to incorporate document changes from the negotiating parties, negotiation tasks are primarily intended to manage long-term tasks associated with contract negotiations with multiple rounds and to capture notes or comments related to each round. For example, if you are negotiating a contract with a supplier or customer, a negotiation task can capture comments from all negotiating parties, or negotiation reviewers, and changes.

Negotiation tasks have the following key features:

- External reviewers. The negotiation reviewers can be external users who do not have SAP Ariba sign in accounts. For more information, see External Reviewers [page 322].
- You cannot create negotiation tasks for assembled PDF documents.
- Reviewers for negotiation tasks cannot be granted edit access. If a reviewer for a negotiation tasks does not already have edit access to the document, the reviewer cannot modify the document in the system. However, reviewers for negotiation tasks can create counterproposals that include a modified document. The user processing a counterproposal can review and incorporate changes from the reviewer and submit a new version of the document for a new negotiation round.

A counterproposal can also contain a description of the proposed changes. This is often used when the negotiation task is for a form. (The form user interface cannot be used to create a counterproposal.) The user processing the counterproposal must make the changes for the negotiation reviewer.

For more information about working with negotiation tasks, see Managing Negotiation Tasks [page 343].

What Are Publish Document Tasks?

Publish Document tasks allow you to schedule the automatic publication of surveys for any project type.

Publish document tasks can be deployed in the following contexts:

- If you create a survey yourself within a project, you can create a publish document task to automatically publish the survey on a specific date.
- If you are an administrator and you want to control the publication dates of surveys that are based on a survey template, you can do so by creating a publish document task for that survey template within a project template. For example, a project template might contain two survey templates, one to assess supplier performance 30 days after the project start date and another to assess supplier performance 20 days after the project end date.You can create publish document tasks on the project template to ensure that each of these surveys is published on the correct dates relative to the start and end dates on the actual project.

For more information about working with publish document tasks, see Managing Publish Document Tasks [page 350].

What Are Signature Tasks?

Signature tasks are available only in SAP Ariba Contracts projects.

Signature tasks enable you to collect electronic signatures from internal and external signers on a contract stored in a published PDF document. To create a Signature task, you must first enable the Electronic Signature feature, an optional add-feature for SAP Ariba Contracts.

If you have enabled the Electronic Signature feature in your SAP Ariba system, you can create Signature tasks to collect electronic signatures. The Electronic Signature feature enables you to collect signatures:

- Rapidly. Unlike a manual signing process, Electronic Signature enables you to quickly obtain required signatures on important, time-sensitive contracts from a large number of customers or suppliers located throughout the world.
- Flexibly. If you initiate the signing process and then decide to modify the signer list, you can quickly and easily add or remove signers and restart the process.
- Securely. Electronic Signature provides full compliance with electronic signature legal requirements, including full validation of your signers' identities and guaranteed access to a single, tamper-proof master copy of your signed document with a full audit trail.
- Inexpensively. Using electronic signatures eliminates the costs of physical signature collection, such as paper, mailing, and shipping.

For more information about working with Signature tasks, see Management of Signature Tasks [page 354].

Task Owners and Participants

Original Task Owners

When a task inherited from a template is submitted or started in a project, each member of the project group specified in the Owner field for the task in the template becomes an original task owner. The Owner field in a template must be a project group; the default value is the Project Owner group.

Original task owners for document tasks have the same capabilities as task owners.

For inherited To Do tasks, only an original task owner or user with Project Owner capabilities can mark the task Started or Completed.

For inherited document and notification tasks, only members of the project group specified in the Owner field for the task in the template (users who will become original task owners) or users with Project Owner capabilities can submit the task.

Task Owners for To Do Tasks

For To Do tasks, the task owner is both the owner and the user responsible for completing the task. Only the owner can start or complete the task.

Task Owners for Document and Notification Tasks

For document and notification tasks, the task owner is the user who submits a task or creates the task in a project. In general terms, a task owner is responsible for ensuring that the task is completed but is not necessarily a user who reviews or approves the document for the task.

Users with project owner capabilities in the project have the same capabilities as task owners. (Project owners have owner capabilities for everything in a project, including tasks.)

A task owner for a document task can:

- Process responses for document tasks. Document tasks receive responses from reviewers, approvers, or negotiators that must be processed. For example, reviewers submit comments for a new version of a document, and the task owner decides which comments or changes to incorporate.
- Mark a review or negotiation task complete.
- Cancel an optional task.
- Create new review, negotiation, or approval rounds.
- Remove reviewers or approvers added to an approver flow by a reviewer or approver.

Task owners cannot mark an approval task complete. An approval task is automatically marked complete when all approvers have approved the document.

> ⓘ Note
>
> When a user submits a task that has the task owner field set to a user group, email notifications are not sent to external reviewers. If `Application.ACM.EnableAutoUpdateTaskOwner` parameter is enabled, then the email notifications are sent to external reviewers.

Task Reviewers and Approvers

Reviewers are users assigned to review a document in a review or negotiation task. Approvers are users assigned to approve a document in an approval task. Reviewers and approvers can also add reviewers or approvers to an approval flow. Reviewers and approvers do not need to be members of the project team. They gain access to the task and associated document through the task listing in their calendar or My Tasks list, or through the email notification they receive when they are assigned the task.

Reviewers and approvers can be:

- Internal reviewers: SAP Ariba users who are assigned to review a document in a review or negotiation task.
- Internal reviewers with edit capabilities: An internal reviewer in a review task where the task owner has granted edit capabilities. These reviewers can edit the document in SAP Ariba even if they normally do not have access to the document. For more information, see Reviewers with Edit Access [page 321].
- Email approvers: Users who have an SAP Ariba account can review, approve, or deny a document by sending an email response (without signing in to SAP Ariba). SAP Ariba supports email approvers for review and approval tasks only. For more information, see About Email Approvals for Tasks [page 313].
- External reviewers: External users (such as suppliers or customers) who do not have an SAP Ariba account and who review documents. SAP Ariba supports external reviewers for review and negotiation tasks only. External reviewers are configured using the **New External Reviewer** field. Users added as external reviewers for a task are stored as business contacts on the SAP Ariba server. For more information, see External Reviewers [page 322].

Task Observers and Watchers

Task observers and watchers are similar in that they are not fully involved in a task. The key differences between observers and watchers are:

- Observers have many more capabilities than watchers. Observers can perform the same operations as the task owner, but with the necessary authorization.
- Observers are assigned to an entire task; watchers are added as specific nodes in an approval flow

> ⓘ Note
>
> Task observers and watchers aren't supported in supplier management projects, which include:
>
> - Supplier request projects (internal and external)
> - Supplier registration projects
> - Supplier qualification and disqualification projects
> - Preferred supplier management projects

- Modular questionnaire projects
- Process projects, including process qualifications

Observers

Observers are specified for a task by the task owner or template author. An observer cannot perform any task in a project and the tasks do not appear in the observer's My Tasks list or calendar. However, if the observer belongs to Contract Administrator, Contract Agent or Contract Manager group and is added to the project owner group in the contract workspace, then the observer can perform all the tasks that the project owner group can.

Do not assign a user who is not a member of the project team to be an observer. Assigning a user to be an observer does not bypass normal access requirements for a project; an observer who was not a member of the project team would be unable to access the task.

By default, tasks use a notification profile that sends email notifications to observers when a task is about to become due, a task is overdue, or a task is completed. For more information, see Management of Notification Tasks [page 385].

Observers do not receive an email notification when the task is submitted.

Watchers

Watchers cannot review or approve documents, but are added to approval flows.

Watchers do not need to be members of the project team. They can gain access to the task and associated document through the task listing in their calendar or My Tasks list, or through the email notification they receive when a task is assigned to them.

When a watcher is the active node in an approval flow:

- The watcher can add approvers (or reviewers) to the flow.
- The watcher receives the same email notifications as reviewers or approvers.

Watchers can dismiss a task so it no longer appears in their calenders, **My Tasks** list or tasks tile.

Parent topic: About Tasks [page 300]

Related Information

Task Types [page 301]
Additional Task Features [page 310]

Additional Task Features

Parent topic: About Tasks [page 300]

Related Information

Task Types [page 301]
Task Owners and Participants [page 307]

Multiple Task Rounds and Document Version Tracking

Review, approval, and negotiation tasks can have multiple rounds. For example, if a reviewer proposes changes to a document, you can start another review round for the same task. This enables you to maintain a history of all review changes in one task. When you create a new round for a task, you can specify new reviewers and a new due date.

The version of a document sent to a reviewer is set when the task (or round) is submitted. If a user (typically the task owner) creates a new version of the document before the reviewer views the task details, SAP Ariba indicates both the version the reviewer received and the current version. For example, if the reviewer receives version 1 (v1) of a document and the current document version is version 2, SAP Ariba shows the following version notation after the file name:

`(v1/2)`

If you are working with an SAP Ariba Contracts workspace and the task is for an entire contract workspace, a new round of the task is created each time a non-administrative amendment is created (creating a non-administrative amendment creates a new draft of the workspace).

Synchronizing Approvals with the Latest Document Version

Template authors can configure a task so that the active task round is cancelled and a new task round is created each time a new version of a published document is created. To configure this behavior, a template author selects the **Repeat for Each Document Draft** option when creating a document task in a project template. To extend the behavior (cancel the active task round and create a new task round when a new document version is created) to all documents, whether or not the document has been published, the template author also selects the **Extend Repeat Option to Unpublished Drafts** option.

Selecting both the **Repeat for Each Document Draft** option and the **Extend Repeat Option to Unpublished Drafts** option for a task in a project template ensures the following behavior:

- there is only one active round for the task
- the task is synchronized with the latest version of the document, even if the document has never been published

Required and Optional Task Types

All tasks can be required or optional except for SAP Ariba Contracts Signature tasks, which are always required. By default, Optional tasks can be cancelled if they have not started.

If you are working with an SAP Ariba Contracts workspace, required tasks must be completed before a contract workspace can be published.

To make a task required, click the **Required** radio button when creating or editing a task. To make a task optional, clear the **Required** radio button.

> ⓘ Note
>
> If a template author makes a task required in a project template, the task cannot be made optional in a project created from the template.

Task Order and Predecessors

When creating a task or phase, you can specify predecessor tasks or phases, which must be completed before users can start the new task or phase. Predecessors enable you to enforce workflow order. For example, you can require that a document is approved by internal team members before using the document in negotiations with an external partner. For more information, see Using Predecessor Tasks and Phases [page 404].

Conditional Tasks and Phases

Template authors can link conditions to a task or phase so the task or phase is automatically included in or excluded from projects created from the template. For example, a template can automatically include a required approval task if a contract value exceeds a specified dollar amount. For more information about using conditions, see Project Template Guide.

Prevent project owners from adding users/groups to review/ approval tasks in guided sourcing

You can configure the guided sourcing templates so that the project owners are restricted from adding users and groups that are not specified in the template to the review and approval tasks in full projects, events, and sourcing requests.

By default, the rule is set to **No** and the project owners can add users and groups to the review and approval tasks in full projects, events, and sourcing requests in guided sourcing.

When set to **Yes**, the project owners are not able to add users and groups to the review and approval tasks in full projects, events, and sourcing requests in guided sourcing. Only the users and groups that are specified in the guided sourcing template for the review and approval tasks are available in the corresponding full projects, events, and sourcing requests.

Document Tasks and DFS

> ⓘ Note
>
> For contract authoring, we recommend that you use **Enhanced Contract Authoring** or integrate your SAP Ariba Contracts instance with Icertis Contract Intelligence (ICI) for SAP Ariba solutions. For more information about these solutions, refer to Enhanced Contract Authoring and Integrating SAP Ariba Contracts with Icertis Contract Intelligence for SAP Ariba Solutions, respectively.

Document tasks use the Desktop File Sync (DFS) feature to enable users to create new document versions in the SAP Ariba system using links from the tasks pages. You can enable DFS when working with document tasks. The procedures described in this chapter for processing review, approval, and negotiation tasks assume that DFS is enabled.

If you do not have DFS enabled, many of the document handling features in tasks will not be available, including:

- the ability to automatically download documents by clicking on a document icon
- the Review Change feature

When you do not have DFS enabled, you must manually download the files you are working with and manually upload revised files.

Document Tasks and the Review Change Feature

The Review Change feature highlights changes from reviewers (or approvers) and enables you to accept or reject these changes within the file. You can then save the file and create a new version of the document on the SAP Ariba server. The Review Change feature uses the Microsoft Word Track Changes feature.

The **Review Change** link is visible in the owner action pane to users with the following roles:

- Project Owners
- Task Owners
- Contract Project Administrators
- Document Editors
- Document Owners
- customersupportadmin
- Users belonging to groups having the project.manage permission, such as Internal Contract Administrator, Limited Event Administrator, Event Administrator, and Contract Admininstrator.

For tasks which have the 'Reviewer can edit' field set to **Yes**, the Review Changes link is visible to the reviewer as well.

> Note
>
> Using multiple versions of Microsoft Word can cause unexpected results. If you receive modified Microsoft Word documents from reviewers and cannot confirm that you are using a Word version which is the same or newer than the version used by the reviewer, SAP Ariba recommends that you do not use the Review Change feature. Instead, create and compare a clean a copy of the reviewer's changes using your version of Microsoft Word. To do this, copy the reviewer's text, paste the text into a plain text editor, and then copy and paste the text from the plain text editor to a new instance of your version of Microsoft Word.

For more information about preparing clean copies of Word documents and additional Word requirements, see Preparing Clean Versions of Word Documents [page 284].

Email Notifications for Tasks

By default, SAP Ariba sends email notifications to users when they are assigned tasks. SAP Ariba also sends email to task owners, approvers, and observers when tasks are overdue by default. You can configure notification parameters for each task. For more information, see Using Task Notification Profiles and Parameters [page 419].

Email Approvals for Tasks

The email approval feature enables SAP Ariba users to complete review or approval tasks without signing in to the SAP Ariba server.

The email approval feature is optional and must be enabled by SAP Ariba. For more information, see Application.Base.EmailApprovalEnabled [page 432].

When the email approval feature is enabled, reviewers and approvers receive email notifications they can use to complete the review or approve or deny the document. The format and contents of the email notifications depend on the default format configured for the installation and the recipient's email notification preferences.

By default, the email notifications contain a clickable link that creates an email response for completing the task. Approvers and reviewers can also sign in to SAP Ariba and complete approval and negotiation tasks assigned to them as they normally would.

ⓘ Note

External reviewers (users who do not have an SAP Ariba sign in account) do not receive email approval messages. External reviewers receive review notifications similar to normal review notifications and the task owner must submit responses from the reviewers on their behalf.

Negotiation tasks do not use the email approval feature.

If you see text in a Task History that is enclosed by angle brackets, an email approver's email application might have inserted HTML tags with encoded angle brackets. For more information, see Application.Approvable.AllowEmailHTMLComments [page 432].

ⓘ Note

For examples of email approval messages and information about responding to these messages, see Searching, Completing Tasks, and Other Common User Actions.

Task Milestones

You can add a milestone label to a task which indicates that completion of the task is a significant event. A milestone task has a milestone icon displayed to the right of it. The icon is informational only and does not affect processing for the task. SAP Ariba displays milestone tasks in the Process area in the full view of a project in addition to the Tasks area.

A template author can specify that a milestone task requires a due date. When a project is created from the template, the task owner must specify a due date for that task to submit the task.

To add a milestone label to a task, click the **Milestone** radio button when creating or editing a task.

Task Alerts

You can add an alert label when creating or editing a task to indicate that the task has special significance. The alert icon is displayed to the left of the task. The icon is informational only and does not affect processing for the task. You can use icons to provide visual clues to flag tasks that are potential problem areas or that require additional attention.

Task Durations in Reports

Reports can include information about task durations (in days). If a task has multiple rounds, the reported task duration includes only the duration of the last round. Task durations cannot be broken down by the duration per approver (or reviewer). If you want to report the task duration for a specific approver, create a separate task for the given approver.

Integration of Tasks with Microsoft Project and Outlook

You can import and export tasks from SAP Ariba to Microsoft Project. You can also export tasks from SAP Ariba to Microsoft Outlook. For more information, see Exporting Tasks to Microsoft Outlook [page 118] and Integration of SAP Ariba Projects with Microsoft Project [page 120].

Management of To Do Tasks

This topic describes how to manage To Do tasks. For general information about all task types and task options, see About Tasks [page 300].

A To Do task is a simple task that tracks an action. Unlike negotiation, review, and approval tasks, a To Do task does not have to be associated with a document.

You can associate To Do tasks with documents. However, To Do tasks do not have features to incorporate document changes from other users or to maintain a history of document changes and comments related to the changes.

You can change a To Do task to a document task by associating a document with the task and changing the task type. This procedure is described in Associating a Document with a To Do Task [page 319].

To Do tasks are the only type of tasks where the task owner is also the user who completes the task.

To Do tasks are not iterative; you cannot have multiple rounds for a To Do task. However, after a To Do task is marked Complete, you can reactivate it.

The To Do task workflow includes the following steps:

1. The project owner optionally edits a To Do task that the project inherited from its template. The task can also be edited by user in a group specified in the Owner field for the task.
   Alternatively, the project owner creates a new task in a project.
2. SAP Ariba adds the task to the task owner's task list. By default, SAP Ariba also sends an email to the task owner.
3. The task owner or project owner optionally marks the task Started.
4. The task owner completes the task.
5. The task owner or project owner marks the task Completed.

Creating To Do Tasks [page 316]

Editing To Do Tasks [page 317]

Marking To Do Tasks Started [page 318]

Canceling Optional To Do Tasks [page 318]

Associating Documents with To Do Tasks [page 319]

Creating To Do Tasks

Use this procedure to create To Do tasks.

Procedure

1. On the **Tasks** tab, choose **Actions** > **Create To Do Task**.

   You can also create a To Do task for a document or folder by navigating to the **Documents** tab, clicking a document name, and choosing **Create New Task** > **To Do**.

   To create a To Do task for the entire project, navigate to the Overview area and choose **Actions** > **View Details**. From the Tasks area, choose **Actions** > **Create New Task** > **To Do**.

   SAP Ariba opens a **New To Do Task** page.
2. Enter a title and description.
3. Specify the task owner. Click the arrow for the **Owner** field to display possible choices.

   For To Do tasks, the task owner is the team member who performs the task. Only the owner can Start or Complete the task in a project.
4. Choose any observers. Observers can view the task and attach documents to the task but do not receive email notifications when the task is submitted. For more information about observers, see Task Owners and Participants [page 307].
5. Specify a due date for the task.
6. Specify if the task is a milestone. For more information about milestones, see About Task Milestones [page 314].
7. Specify if the task is required. For more information about required tasks, see About Required and Optional Task Types [page 311].
8. Specify any predecessors. These tasks or phases must be completed before the current task can start. See Using Predecessor Tasks and Phases [page 404] for details.
9. If you specified predecessor tasks or phases, you can select the **Start When Dependencies Complete** option to make this a self-starting task. Self-starting tasks automatically start when all predecessors are completed. If a document is associated with this task, the document must be in the **Draft** or **Published** state. See Using Self-Starting Tasks and Phases [page 405] for details.
10. Click **OK**.

Task overview: Management of To Do Tasks [page 315]

Related Information

Editing To Do Tasks [page 317]
Marking To Do Tasks Started [page 318]
Canceling Optional To Do Tasks [page 318]

Associating Documents with To Do Tasks [page 319]

Editing To Do Tasks

Use this procedure to edit To Do tasks.

Context

If a project contains a To Do task that has not been started or completed (such as a task inherited from the project template), the project owner can edit the task to assign a different owner and modify other parameters. If a template author makes a task required in a template, the task cannot be made optional in a project created from the template.

Procedure

1. Navigate to the **Tasks** area. Click on the task name and choose **Action** > **Edit Task**.

   SAP Ariba opens an **Edit To Do Task** page.
2. Complete or edit the field values as described in Creating a To Do Task [page 316].
3. Click **OK**.

Task overview: Management of To Do Tasks [page 315]

Related Information

Creating To Do Tasks [page 316]
Marking To Do Tasks Started [page 318]
Canceling Optional To Do Tasks [page 318]
Associating Documents with To Do Tasks [page 319]

Marking To Do Tasks Started

Use this procedure to mark To Do tasks started.

Context

Marking a To Do task Started is not required; a task owner can mark a task Completed even if the task was never marked Started. However, marking a task Started enables you to more accurately track the time needed to complete a task.

The To Do task owner (the person assigned to complete the To Do task) or the project owner can mark a task Started.

Procedure

1. Navigate to the **My Tasks** area if you are the task owner. Navigate to the **Tasks** area if you are the project owner.
2. Click on the task name and choose **Action** > **Mark Started**.

Task overview: Management of To Do Tasks [page 315]

Related Information

Creating To Do Tasks [page 316]
Editing To Do Tasks [page 317]
Canceling Optional To Do Tasks [page 318]
Associating Documents with To Do Tasks [page 319]

Canceling Optional To Do Tasks

Use this procedure to cancel optional To Do tasks.

Context

The project owner or task owner of an optional To Do tasks can cancel the task if it has not been marked Started.

Procedure

1. Navigate to the **My Tasks** area if you the task owner. Navigate to the **Tasks** area if you are the project owner.
2. Click on the task name and choose **Action** > **Edit Task**.
3. In the task details window, choose **Mark Cancelled**.

Task overview: Management of To Do Tasks [page 315]

Related Information

Creating To Do Tasks [page 316]
Editing To Do Tasks [page 317]
Marking To Do Tasks Started [page 318]
Associating Documents with To Do Tasks [page 319]

Associating Documents with To Do Tasks

Use this procedure to associate documents with To Do tasks.

Context

You can associate a project document or folder with a To Do task using the **Associate Document** menu option. When you associate a document with a task, the notification sent to task participants includes a link to the document (or will contain a copy of the document, if the participant is not an SAP Ariba user). If you associate a document to a To Do task, you can also change the task type to Review, Approval, Negotiation, or Notification.

You can use the **Associate Document** menu option only for To Do tasks in a project template or for project ad hoc tasks (project tasks not inherited from the template). The **Associate Document** feature enables you to change task types as well as associate a document or folder with a task.

You can use the **Associate Document** menu option in both projects and templates, but it is only allowed for Inactive tasks. This prevents a task from being changed while another team member is working on it.

Procedure

1. Navigate to the To Do task to which you want to add a document.
2. Click the task title and choose **Associate Document**.

   A dialog box opens with a list of documents and folders in the current project.

3. Select the project document or folder that you want to associate with the task.
4. To change the task type, select a type from the **Task Type** pull-down menu.
5. Click **OK**.

Task overview: Management of To Do Tasks [page 315]

Related Information

Creating To Do Tasks [page 316]
Editing To Do Tasks [page 317]
Marking To Do Tasks Started [page 318]
Canceling Optional To Do Tasks [page 318]

Management of Review Tasks

This topic discusses how to manage review tasks. For general information about all task types and task options, see About Tasks [page 300].

The review task workflow includes the following steps:

1. A project owner submits a review task that the project inherited from its template. The task can also be submitted by an original task owner (a user in a group specified in the Owner field for the task in the template). Alternatively, a project owner creates a new task in a project.
   By default, a document cannot be in the Not Edited state when a task is submitted; the project owner must open or publish the document before submitting the task. For information about changing this requirement, see Application.ACM.TasksAllowSubmissionOfUneditedDocuments [page 431].
2. SAP Ariba adds the task to the reviewers' task lists. SAP Ariba also sends an email to the reviewers with the review document attached. (If the approval flow contains serial reviewers, SAP Ariba initially performs these operations only for reviewers that have no predecessors, and then performs these operations for the users in subsequent approval nodes as the approval flow progresses.)
3. Each reviewer completes his or her review. The reviewers can submit a modified review document and any comments. SAP Ariba attaches the modified document to the task.
4. The task owner processes the reviews. The task owner can:
   - View comments from a reviewer.
   - Review the changes sent in a modified document from a reviewer. If the document is a Microsoft Word document (and DFS is enabled), SAP Ariba merges the modified document with the current document in SAP Ariba and creates a new document with Microsoft Word Track Changes feature enabled and the changes highlighted. The task owner can use the Track Changes feature to accept or reject each change, then save the document as a new version in the system.
   - Create a new review round.
   - Mark the review task complete. If the document was not modified during the review and was not in the published state, the task owner can publish the document from the task details page.

   Reviewers with Edit Access [page 321]

Reviewers with Edit Access

Review task submitters can grant internal reviewers edit access. This feature:

- Enables the reviewer to modify or replace the document in SAP Ariba and create a new version of the document in the SAP Ariba system even if the reviewer would not otherwise have the ability to modify the document. The task owner can still view the modified version and accept or reject the version.
- Creates a lock for the document. Only one reviewer can hold the lock and edit the document at a time. The first reviewer to open the document holds the lock until he or she completes the review.

> ⓘ Note
>
> The review task is linked to the current version of the document at the time the task is submitted. If a user creates a new document version after a review task is submitted but before a reviewer with edit access reviews the document, SAP Ariba does not allow the user to directly modify the current document in the system. The reviewer receives a copy of the document that was current at the time the task was submitted (with that version number and the newest version number indicated) and can review, modify, and submit that document but cannot directly modify the current version of the document in the system.

Configuring Edit Access for Reviewers

You configure edit acces for reviewers from the **Advanced Task Details** tab, as described in Configuring Advanced Task Details [page 391].

Parent topic: Management of Review Tasks [page 320]

Related Information

External Reviewers [page 322]

Creating Review Tasks [page 323]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
Configuring Edit Access for Reviewers [page 327]
Viewing the Status of Review Flows [page 328]
Processing Reviews from Internal Reviewers Without Edit Access [page 329]
Processing Reviews from Internal Reviewers with Edit Access [page 330]
Processing Reviews from External Reviewers [page 332]
Comparing Line Items Documents from Reviewers [page 334]

External Reviewers

An external reviewer is a task reviewer who does not have an SAP Ariba sign in account. For example, you can work with an external supplier to edit a contract document by assigning that supplier as an external reviewer. When you specify an external reviewer for a review task, SAP Ariba sends an email to the reviewer with the review document attached. When the external reviewer replies (via email), the reviewer can attach a modified version of the document.

When the task owner receives the email from the reviewer, the owner can save the document in the message to a file and submit the file to SAP Ariba on behalf of the external reviewer. SAP Ariba attaches the modified document to the task. The task owner can then view the task details and process the document as one would process a modified document from an internal reviewer.

> ⓘ Note
>
> External reviewers are not the same as email approvers. An email approver is a user with an SAP Ariba account who can complete a review or approval task by sending an email message. For more information about email approvers, see About Email Approvals for Tasks [page 313].

> ⓘ Note
>
> When a user submits a task that has the task owner field set to a user group, email notifications are not sent to external reviewers. If `Application.ACM.EnableAutoUpdateTaskOwner` parameter is enabled, then the email notifications are sent to external reviewers.

By default, SAP Ariba includes a System Reference link to the task at the bottom of the email notifications sent to the external reviewer. Because external reviewers do not have access to SAP Ariba, nothing happens if reviewers click it. If this reference is included in the reply to the task owner, the task owner can use it to access the system.

When you add external reviewers to a task, SAP Ariba adds them to the business contacts in the system. Administers can manage information about business contacts from Ariba Administrator by choosing **User Manager** > **Business Contacts**. For more information, see Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.

Parent topic: Management of Review Tasks [page 320]

Related Information

[Reviewers with Edit Access [page 321]]
[Creating Review Tasks [page 323]]
[Editing and Submiting Review Tasks Inherited from a Template [page 325]]
[Configuring Edit Access for Reviewers [page 327]]
[Viewing the Status of Review Flows [page 328]]
[Processing Reviews from Internal Reviewers Without Edit Access [page 329]]
[Processing Reviews from Internal Reviewers with Edit Access [page 330]]
[Processing Reviews from External Reviewers [page 332]]
[Comparing Line Items Documents from Reviewers [page 334]]

Creating Review Tasks

Use this procedure to create review tasks.

Procedure

1. To create a review task for a document, navigate to the **Documents** area. Click the document name and choose **Action** > **Create New Task** > **Review**.

   To send multiple documents for review, group the documents in a folder. Click the folder name and choose **Create New Task** > **Review**.

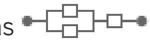
   To create a review task for the entire project, navigate to the Overview area and choose **Actions** > **View Details**. From the Tasks area, choose **Actions** > **Create New Task** > **Review**.

   SAP Ariba opens a **Select Reviewers** page.

   > ⓘ Note
   >
   > When a user submits a task that has the task owner field set to a user group, email notifications are not sent to external reviewers. If `Application.ACM.EnableAutoUpdateTaskOwner` parameter is enabled, then the email notifications are sent to external reviewers.

2. Enter a title and description for the task.
3. Add reviewers using one of the following methods:
   - Add reviewers in the editable **Reviewers** field. If you use this method, you can add only parallel or serial reviewers, but not both parallel and serial reviewers. SAP Ariba does not expand any groups added to the flow. For additional information about restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
     - Click the radio button next to **Parallel** or **Serial** to specify the type of approvers you want to add.
     - Click the arrow for the **Reviewers** field to display possible choices. A reviewer can be an internal user or an external user already configured in the system.

To add an email address for an external reviewer not already configured in the system, click **New External Reviewer**.
If you specify multiple serial reviewers, add the reviewers in the order you want them to review the document (the first reviewer you specify will be the first reviewer in the review flow).

- Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as ) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414].

For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].

4. Specify if the project owners are restricted from adding users and groups to the task. For more information, refer to Prevent project owners from adding users/groups to review/approval tasks in guided sourcing [page 312].
5. Choose any observers. Observers can view the task and attach documents to the task but do not have to review the document. For more information about observers, see Task Owners and Participants [page 307].
6. Specify a due date for the task.
7. Specify if the task is a milestone. For more information about milestones, see About Task Milestones [page 314].
8. Specify if the task is required. Required tasks cannot be cancelled. For more information about required tasks, see About Required and Optional Task Types [page 311].
9. Specify any predecessors. These tasks must be completed before the task can start. Required tasks in SAP Ariba Contracts workspaces must be completed before the workspace can be published. See Using Predecessor Tasks and Phases [page 404] for details.
10. If you specified predecessor tasks or phases, you can select the **Start When Dependencies Complete** option to make this a self-starting task. Self-starting tasks automatically start if all predecessors are completed and the document associated with the task is in the **Draft** or **Published** state. See Using Self-Starting Tasks and Phases [page 405] for details.
11. If the document is a Main Agreement or Contract Addendum and all reviewers are external reviewers (reviewers who do not have an SAP Ariba sign in account), you can select **Send Clean Document to Email Reviewers** to generate a clean version of the document that is sent in the email to the reviewers.

    A "clean" document does not contain red lines or other markers to indicate changes made in previous versions. In addition, document property fields are replaced with literal text. The clean document is sent only to external reviewers; the document in stored in the project retains red lines and document property fields.

    > Note
    >
    > If you select **Send Clean Document to Email Reviewers** and task has internal reviewers, you will get an error when you attempt to submit the task.

12. Enter a message to the reviewers. You can also include additional files as attachments. (Attachment files are not indexed for keyword searching.)
13. (Optional) Expand **Advanced Task Details** near the bottom of the page to configure the following features:
    - Edit access for reviewers
    - Document lock
    - Notifications for comments
    - Display order
    - Alert icon
      For more information, see Configuring Edit Access for Reviewers [page 327] and Configuring Advanced Task Details [page 391].

14. To view or modify the notification parameters that determine the time intervals for sending notifications for the task, expand **Notifications**. For more information, see Using Task Notification Profiles and Parameters [page 419].
15. Click **Submit**.

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
Configuring Edit Access for Reviewers [page 327]
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Editing and Submiting Review Tasks Inherited from a Template

Use this procedure to edit and submit review tasks inherited from a template.

Context

A project can contain tasks inherited from its project template. You must submit these tasks to start them. You can also edit these tasks with the following exceptions:

- If a template author makes a task required in a template, you cannot make the task optional in a project.
- You cannot remove reviewers specified in the template.

Procedure

1. Navigate to the Tasks area. Click the name of the task you want to submit and choose **View Task Details**.

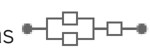
   SAP Ariba opens a **Review Task** page. SAP Ariba displays different fields depending on the presence of reviewers in the template task and the state of the document. The menu options available for a task's associated documents also differ depending on the structure of the approval flow:

- When there is a single approval node that contains a single user, then the **Download** and **View Details** options appear before the document is reviewed. However, after the reviewer completes the review, only the **Download** option appears on clicking the associated document name.
- When the approval flow is structured in any of the following ways, the **Download** and **View Details** options appear:
  - Single node that contains a group
  - Single node that contains a custom list of users
  - Multiple nodes that contain users
  - Multiple nodes that contain groups
  - Multiple nodes that contain a combination of users and groups

  In case of the approval flow containing multiple nodes each with a single user, only the **Download** option appears after the first reviewer completes the review. The **View Details** option also appears after all reviewers complete their review.

2. If reviewers were specified in the template and you want to add reviewers, click the **Review Flow** tab near the bottom of the page to open the approval flow editor.

   If reviewers were not specified in the template, add reviewers using one of the following methods:

   - Add reviewers in the editable **Reviewers** field. If you use this method, you can add only parallel or serial reviewers, but not both parallel and serial reviewers. SAP Ariba does not expand any groups added to the flow. For additional information about restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
   - Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as ) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414]. For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].
3. Edit or complete values for the remaining fields as described in Creating a Review Task [page 323].
4. Click **Submit**.

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
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Configuring Edit Access for Reviewers

Use this procedure to configure edit access for reviewers.

Procedure

1. In the area below the **Review Task** pane for submitting or creating a task, expand **Advanced Task Details**.
2. Select **Yes** for **Reviewer Can Edit** to enable internal reviewers to directly edit the documents in the system. This also creates a lock for the document in the system. The reviewer can also create a new version of the document in the system or replace the document. The task owner can compare document versions and accept or reject the changes.

Results

For information about the other fields in the Advanced Task Details area, see Configuring Advanced Task Details [page 391].

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
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Viewing the Status of Review Flows

Use this procedure to view the status of review flows.

Context

You can view who has reviewed the document and which reviewers have not yet reviewed the document.

Procedure

1. Click the task name under the **Tasks** tab.
2. Select **View Task Details**.
3. Click the **Review Flow** tab.

   See About the Status of Approvers in Approval Flows [page 410] for an example approval flow and how to interpret an approval (review) flow.

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
Creating Review Tasks [page 323]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
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Processing Reviews from External Reviewers [page 332]
Comparing Line Items Documents from Reviewers [page 334]

Processing Reviews from Internal Reviewers Without Edit Access

Use this procedure to process reviews from internal reviewers withut edit access.

Context

By default, reviewers do not have edit access. Reviewers who do not have edit access will submit a copy of the reviewed document and the task owner processes changes that the reviewer made to the copy of the document.

Procedure

1. In the Overview area on the **Overview** project tab, choose **Actions** > **View Details**.
2. In the Tasks area, click on the name of the appropriate task. Choose **Action** > **View Task Details**.

   SAP Ariba opens a **Review Task** page.
3. Click the **Task History** tab to display a list of review comments and revised document submitted by the reviewers.
4. The revised documents submitted by the reviewers are attached to the task but are not incorporated as new versions of the document. You must review the changes and create a new version of the document stored in the SAP Ariba system to incorporate changes from each reviewer.

   If the file is a Microsoft Word document, you can click **Review Change** in the **Awaiting Owner Action** window pane (on the right) or under the **Task History** tab. SAP Ariba merges the revised file with the current version of the document in the SAP Ariba system and opens the file with the Microsoft Word Track Changes feature enabled. Microsoft Word highlights the changes and displays a Reviewing toolbar similar to the following:

   

   Use the icons in the Reviewing toolbar to navigate the changes and accept or reject each change. (For more information about using the Microsoft Word Reviewing toolbar and Track Changes feature, see the Microsoft Word documentation.) Save the file and exit Microsoft Word.

   > **Note**
   >
   > SAP Ariba recommends that you use the Review Change feature only if you can confirm that you are using a Word version that is the same or newer than the version used by the reviewer. Merging Microsoft Word files that were opened using different Microsoft Word versions can cause unexpected results and lost data. For more information, see About Document Tasks and the Review Change Feature [page 312].

   If the file is not a Microsoft Word document, use the appropriate application to open the file and make modifications to the document as needed. Save the file.

   If the document is a contract line items document, you can use the procedure described in Comparing Line Items Documents from Reviewers [page 334] to generate an Excel file that highlights differences between the original document and changes made by the reviewer.

5. SAP Ariba opens a **Document Update** window. Click **Update Now**.
6. SAP Ariba opens a window for you to create a new version of the document.

   Click **Yes, save as v** *n* (where *n* is the next version number for the document).

   Enter a description of your changes and click **Save**.
7. SAP Ariba returns to the **Review Task** page.

   If multiple reviewers responded, return to the area under the **Task History** tab and continue processing responses.

   If you want users to review the document again, click **New Round**. SAP Ariba opens a **Review Task** page. Add any comments and update the due date and other fields as needed. You can also replace the document by clicking on the document name and selecting **Replace Document**.

   If no additional review rounds are needed, click **Mark Complete** and add any comments.
8. Click **Submit** or **OK**.
9. After you have marked the task complete, you can view the task details again to start a new round, replace the document, or publish the document (if it is not already published).

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
Creating Review Tasks [page 323]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
Configuring Edit Access for Reviewers [page 327]
Viewing the Status of Review Flows [page 328]
Processing Reviews from Internal Reviewers with Edit Access [page 330]
Processing Reviews from External Reviewers [page 332]
Comparing Line Items Documents from Reviewers [page 334]

Processing Reviews from Internal Reviewers with Edit Access

Use this procedure to process reviews from internal reviewers with edit access.

Context

Internal reviewers who have edit access can create a new version of the document on the SAP Ariba server.

Procedure

1. In the **Tasks** area, click on the name of the appropriate task. Choose **Action** > **View Task Details**.

   SAP Ariba opens a **Review Task** page.
2. Click the **Task History** tab to display a list of review comments and revised document submitted by the reviewers.

   Because the reviewer has edit access, the reviewer was able to create a new version of the document in the SAP Ariba system with his or her changes. To view the new version, click on the document icon in the **Awaiting Owner Action** pane on the right.

   You can also compare the new version to the previous version.
   - Go to the **Documents** tab and open the **Version History** of the document.
   - Click on the summary of the changes, then select **Compare With** > **Previous Version**.

   If the document is a contract line items document and you have a previously published version of the document, you can review changes made by reviewers by choosing **Action** > **Publish**. A page with a **Line Items Document Changes** table opens that enables you to view the changes before you publish a new version.
3. If you want users to review the document again, click **New Round**. SAP Ariba opens a **Review Task** page. Add any comments and update the due date and other fields as needed. You can also replace the document by clicking on the document name and selecting **Replace Document**.

   If no additional reviews are needed, click **Mark Complete** and add any comments.
4. Click **Submit** or **OK**.
5. After you have marked the task complete, you can view the task details again to start a new round, replace the document, or publish the document (if it is not already published).

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
Creating Review Tasks [page 323]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
Configuring Edit Access for Reviewers [page 327]
Viewing the Status of Review Flows [page 328]
Processing Reviews from Internal Reviewers Without Edit Access [page 329]
Processing Reviews from External Reviewers [page 332]
Comparing Line Items Documents from Reviewers [page 334]

Processing Reviews from External Reviewers

Use this procedure to process reviews from external reviewers.

Context

The following procedure describes one method to incorporate document changes from external reviewers. This procedure is similar to the procedure for incorporating document changes from internal reviewers without edit capabilities, except that the task owner loads the modified document on behalf of the external user.

You can also use the **Merge Documents** operation for a document to merge a modified document from a reviewer with the document in the system.

Procedure

1. Save the modified document file received in the email from the reviewer to your file system. Do not use any of the following special characters in the file name:

   ```
   \ / : ? “ < > | # + % &
   ```

   > → Tip
   >
   > If the external reviewer uses a version of Microsoft Word that is different than your version or you cannot confirm the reviewer's Microsoft Word version, convert and store the document using your Microsoft Word version, if possible. For more information, see Microsoft Word Integration with SAP Ariba [page 280].

2. In the Overview area on the **Overview** project tab, choose **Actions** › **View Details**.
3. In the Tasks area, click on the name of the appropriate task. Choose **Action** › **View Task Details**.

   SAP Ariba opens a **Review Task** page.
4. Click **Complete Review**.

   SAP Ariba opens a **Reviewed** page that enables you to load the external reviewer's file into the SAP Ariba system on his or her behalf.
5. Enter a comment message in the **Message** area. You can use this area to include content from the reviewer's email.
6. In the **Attach Revised Document** field, select the modified document file from the reviewer (saved in Step 1) by browsing for the file, entering the file path, or dropping a file icon in the drag-and-drop box.
7. Add any additional files, such as supporting documents received from the reviewer and click **OK**.

   SAP Ariba opens a **Review Task** page.
8. The revised file submitted by the task owner on behalf of the external reviewer is attached to the task. However, the revised file is not incorporated as a new version of the document until the task owner reviews the changes and creates a new version of the document stored in the SAP Ariba system.

   If the file is a Microsoft Word document, SAP Ariba shows a **Review Change** link in the **Awaiting Owner Action** window pane (on the right) or under the **Task History** tab. This link creates a merged file that contains the reviewer’s file and the current version of the document in the system. SAP Ariba opens the file with the Microsoft Word Track Changes feature enabled. Microsoft Word highlights the changes and displays a Reviewing toolbar similar to the following:

Use the icons in the Reviewing toolbar to navigate the changes and accept or reject each change. Save the file and exit Microsoft Word.

> **Note**
>
> SAP Ariba recommends that you use the Review Change feature only if you can confirm that you are using a Word version which is the same or newer than the version used by the reviewer. Merging Microsoft Word files that were opened using different Microsoft Word versions can cause unexpected results and lost data. For more information, see About Document Tasks and the Review Change Feature [page 312].
>
> If you are using SAP Ariba Contracts and the document is an assembled contract document (Main Agreement or Contract Addendum) the reviewer might have deleted text so that an entire clause is deleted. In this case, the deleted clause is replaced with the Empty Clause (“Clause intentionally deleted”) when the document is regenerated if soft clause deletion is enabled. This replacement is recorded in the Microsoft Word review markups with only the Windows sign in name of the person regenerating the document (the name of the external reviewer is not included).
>
> If the file is not a Microsoft Word document or you do not want to use the Review Change feature, open the reviewed file and the current file in SAP Ariba using the appropriate application. Apply changes from the reviewed file to the current file in SAP Ariba as needed. Save the file in the SAP Ariba system.
>
> If the document is a contract line items document, you can use the procedure described in Comparing Line Items Documents from Reviewers [page 334] to generate an Excel file that highlights differences between the original document and changes made by the reviewer.

9. SAP Ariba opens a **Document Update** window. Click **Update Now**.
10. SAP Ariba opens a window for you to create a new version of the document.

    Click **Yes, save as v** *n* (where *n* is the next version number for the document).

    Enter a description of your changes and click **Save**.
11. SAP Ariba returns to the **Review Task** page.

    If you want users to review the document again, click **New Round**. SAP Ariba opens a **Review Task** page. Add any comments and update the due date and other fields as needed. You can also replace the document by clicking on the document name and selecting **Replace Document**.

    If no additional reviews are needed, click **Mark Complete** and add any comments.

    Click **Submit** or **OK**.

    After you have marked the task complete, you can view the task details again to start a new round, replace the document, or publish the document (if it is not already published).

Task overview: Management of Review Tasks [page 320]

Related Information

[Reviewers with Edit Access [page 321]]
[External Reviewers [page 322]]
[Creating Review Tasks [page 323]]
[Editing and Submiting Review Tasks Inherited from a Template [page 325]]
[Configuring Edit Access for Reviewers [page 327]]
[Viewing the Status of Review Flows [page 328]]
[Processing Reviews from Internal Reviewers Without Edit Access [page 329]]
[Processing Reviews from Internal Reviewers with Edit Access [page 330]]
[Comparing Line Items Documents from Reviewers [page 334]]

Comparing Line Items Documents from Reviewers

Use this procedure to compare line items documents from reviewers.

Context

If you have a line items document reviewed by either an internal user who does not have review access to the document or an external reviewer, the reviewer can send you an Excel version of the line items document with changes.

Procedure

1. If you are processing a review from an external reviewer, save and submit the reviewer's document as described in Processing Reviews from External Reviewers [page 332].
2. If a reviewer submitted an Excel version of a line items document or you submitted an Excel version of a line items document on behalf of an external reviewer, open the task details page and click the **Compare** link in the right pane.

Results

SAP Ariba generates an Excel document that shows the differences between the reviewer's changes and the document sent for review. Click **Open** or **Save** to view the document. The document has the name `title-`*`UserName`*`.xls`, where `title` is the original document title and *`UserName`* is the name of the reviewer. The document contains the following worksheets:

- **Contract Header**: Contains columns with project header values.

> **Note**
> These values are provided to users for information only. SAP Ariba does not import values from this worksheet, so changes to this worksheet have no effect on the project.

- **Contract Item Information**: Contains entries for the line items. Each row represents a line item, and each column represents a line item term.
- **Header Attributes**: Not used.
- **Item Attributes**: Contains changes to line item terms for all terms not included in the **Contract Item Information** page, such as terms specific to item master data or an associated SAP Ariba Procurement solutions compliance contract. Note that changing values for item master data terms can cause you to create line items that are invalid and rejected by the external system.

In most cases, you will only view the changes on the **Contract Item Information** page and manually merge them with the original document if they are acceptable.

The rows are color coded as follows:

- White background: Entry with no change.
- Pink background: Entry from the original document that has been changed or deleted. If the entry was changed, there is a row below with a green background and the same item number that contains the changed values. If the entry was deleted, there is no corresponding row with a green background and same item number.
- Green background. An entry added by the reviewer or an entry for an item modified by the reviewer.

The following is a portion of a **Contract Item Information** worksheet from an Excel document generated to compare the original document with a version submitted by a reviewer:

	901	aaa
	902	bbb
	903	ccc
	904	ddd
	904	ddd
		eee

In this example, the columns from left to right are: **Bundle** (not used), **Item Number** (used to correlate an item with entries on the **Item Attributes** worksheet), and **Short Name** (from the **Name** field in the user interface). The differences between the document submitted by the reviewer and the original document are as follows:

- Item `aaa`: No change. The background is white.
- Item `bbb`: Deleted. The background is pink, but the background of the row below it is not green.
- Item `ccc`: No change. The background is white.
- Item `ddd` Changed. The row with the pink background is the original entry; the row with the green background contains the reviewer's changes.
- Item `eee`: New item added by the reviewer. The background is green and the row below it is empty. The reviewer did not specify a value for **Item Number** and SAP Ariba will generate a value.

Task overview: Management of Review Tasks [page 320]

Related Information

Reviewers with Edit Access [page 321]
External Reviewers [page 322]
Creating Review Tasks [page 323]
Editing and Submiting Review Tasks Inherited from a Template [page 325]
Configuring Edit Access for Reviewers [page 327]
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Processing Reviews from External Reviewers [page 332]

Management of Approval Tasks

This topic describes how to manage approval tasks. For general information about all task types and task options, see About Tasks [page 300].

The approval task workflow includes the following steps:

1. A project owner submits an approval task that the project inherited from its template. The task can also be submitted by user in a group specified in the Owner field for the task. You can add users to the approval flow but cannot remove users specified in the template as part of the approval flow.
   Alternatively, a project owner creates a new task in a project.
   By default, a document cannot be in the Not Edited state when a task is submitted; the project owner must open or publish the document before submitting the task. For information about changing this requirement, see Application.ACM.TasksAllowSubmissionOfUneditedDocuments [page 431].
2. SAP Ariba adds the task to the approvers' task lists. SAP Ariba also sends an email to the approvers with the document attached. If the approval flow contains serial approvers, SAP Ariba initially performs these operations only for approvers that have no predecessors, and then performs these operations for users in the subsequent approval nodes as the approval flow progresses.
3. Each approver approves or denies the task. Approvers can include comments and attach files in their responses. If an approver denies the task, he or she can submit a modified document in addition to any comments and attached files. SAP Ariba attaches the modified document to the task.
4. The task owner views the details for the task and processes the approvals or denials.
   If all approvers approve the task, the task is complete and no further action is required.
   If an approver denies the task, the approval flow stops. The task owner must create a new approval round and restart the approval flow. In addition, the task owner can:
   - View comments from the approver.
   - Review the changes sent in a modified document from the approver. If the document is a Microsoft Word document, SAP Ariba merges the modified document with the current document in theSAP Ariba system and creates a new document with Microsoft Word Track Changes feature enabled and the changes highlighted. The task owner can use the Track Changes feature to accept or reject the changes, then save the document as a new version in the SAP Ariba system.
     The task owner must create new approval rounds until all approvers have approved the task.
     The task owner can withdraw a round after it starts. This enables the owner to create a new version of a document for approval. For more information, see Withdrawing an Approval Round [page 343].

> **Note**
>
> Do not use approval tasks to manage approvals for an SAP Ariba Sourcing event. Instead, use Approval for Launch and Approval for Awarding tasks to manage approvals for an event.

Creating Approval Tasks

Use this procedure to create approval tasks.

Procedure

1. To create an approval task for a document, navigate to the Documents area. Click the document name and choose **Create New Task** > **Approval**.

   To send multiple documents for approval, group the documents in a folder. Click the folder name and choose **Create New Task** > **Approval**.

   To create an approval task for the entire project, navigate to the **Overview** area and choose **Actions** > **View Details**. From the Tasks area, choose **Actions** > **Create New Task** > **Approval**.

   SAP Ariba opens a **Select Approvers** page.
2. Enter a title and description for the task.
3. Add approvers using one of the following methods:
   - Add approvers in the editable **Approvers** field. If you use this method, you can add only parallel or serial approvers, but not both parallel and serial approvers. SAP Ariba does not expand any groups added to the flow. For additional information about restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
     - Click the radio button next to **Parallel** or **Serial** to specify the type of approvers you want to add.
     - Click the arrow for the **Approvers** field to display possible choices.
       If you specify multiple serial approvers, add the approvers in order you want them to approve the document (the first approver you specify will be the first approver in the approval flow).
   - Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414].

   For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].

4. Specify if the project owners are restricted from adding users and groups to the task. For more information, refer to Prevent project owners from adding users/groups to review/approval tasks in guided sourcing [page 312].
5. Choose any observers. Observers can view the task and attach documents to the task but do not have to approve the document. For more information about observers, see Task Owners and Participants [page 307].
6. Specify a due date for the task.
7. Specify if the task is a milestone. For more information about milestones, see About Task Milestones [page 314].
8. Specify if the task is required. Required tasks cannot be cancelled. Required tasks in SAP Ariba Contracts workspaces must be completed before the workspace can be published. For more information about required tasks, see About Required and Optional Task Types [page 311].
9. Specify any predecessors. These tasks must be completed before the task can start. See Using Predecessor Tasks and Phases [page 404] for details.
10. If you specified predecessor tasks or phases, you can select the **Start When Dependencies Complete** option to make this a self-starting task. Self-starting tasks automatically start if all predecessors are completed and the document associated with the task is in the **Draft** or **Published** state. See Using Self-Starting Tasks and Phases [page 405] for details.
11. Enter a message to the approvers. You can also include additional files as attachments. (Attachment files are not indexed for keyword searching.)
12. (Optional) Expand **Advanced Task Details** to configure the following features:
    - Document lock
    - Notifications for comments
    - Display order
    - Alert icon
      For more information, see Configuring Advanced Task Details [page 391].
13. To view or modify the notification parameters that determine the time intervals for sending notifications for the task, expand **Notifications**. For more information, see Using Task Notification Profiles and Parameters [page 419].
14. Click **Submit**.

Task overview: Management of Approval Tasks [page 336]

Related Information

Editing and Submiting Approval Tasks Inherited from Templates [page 339]
Viewing the Status of Approval Flows [page 340]
Processing Approvals for Approval Tasks [page 341]
Processing Denials for Approval Tasks [page 341]
Withdrawing an Approval Round [page 343]

Editing and Submiting Approval Tasks Inherited from Templates

Use this procedure to edit and submit approval tasks inherited from templates.

Context

A project can contain tasks inherited from its project template. You must submit these tasks to start them. You can also edit these tasks with the following exceptions:

- If a template author makes a task required in a template, you cannot make the task optional in a project.
- You cannot remove reviewers specified in the template.

To edit and submit an approval task inherited from a template:

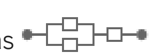
Procedure

1. Navigate to the Tasks area. Click the name of the task you want to submit and choose **View Task Details**.

   SAP Ariba opens an **Approval Task** page. SAP Ariba displays different fields depending on the presence of approvers in the template task and the state of the document. The menu options available for a task's associated documents also differ depending on the structure of the approval flow:
   - When there is a single approval node that contains a single user, then the **Download** and **View Details** options appear before the document is approved. However, after the approver approves the document, only the **Download** option appears on clicking the associated document name.
   - When the approval flow is structured in any of the following ways, the **Download** and **View Details** options appear:
     - Single node that contains a group
     - Single node that contains a custom list of users
     - Multiple nodes that contain users
     - Multiple nodes that contain groups
     - Multiple nodes that contain a combination of users and groups

     In case of the approval flow containing multiple nodes each with a single user, only the **Download** option appears after the first approver approves the document. The **View Details** option also appears after all approvers approve the document.
2. If approvers were specified in the template and you want to add approvers, the screen includes an **Approval Flow** tab. Click this tab to open the approval flow editor and add approvers.

   If approvers were not specified in the template, add approvers using one of the following methods:

   - Add approvers in the editable **Approvers** field. If you use this method, you can add only parallel or serial approvers, but not both parallel and serial approvers. For additional restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
   - Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as ) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414].

For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].

3. Edit or complete values for the remaining fields as described in Creating an Approval Task [page 337].
4. Click **Submit**.

Task overview: Management of Approval Tasks [page 336]

Related Information

Creating Approval Tasks [page 337]
Viewing the Status of Approval Flows [page 340]
Processing Approvals for Approval Tasks [page 341]
Processing Denials for Approval Tasks [page 341]
Withdrawing an Approval Round [page 343]

Viewing the Status of Approval Flows

Use this procedure to view who has approved or denied the document and which approvers have not yet approved the document.

Procedure

1. Click the task name under the **Tasks** tab.
2. Select **View Task Details**.
3. Click the **Approval Flow** tab near the bottom of the page.

   See About the Status of Approvers in Approval Flows [page 410] for an example approval flow and how to interpret an approval flow.

Task overview: Management of Approval Tasks [page 336]

Related Information

Creating Approval Tasks [page 337]
Editing and Submiting Approval Tasks Inherited from Templates [page 339]
Processing Approvals for Approval Tasks [page 341]
Processing Denials for Approval Tasks [page 341]
Withdrawing an Approval Round [page 343]

Processing Approvals for Approval Tasks

Use this procedure to process approvals for approval tasks.

Context

If all approvers approve a document, no further action is required; the task is completed. The task owner can optionally:

- View comments from the approvers.
- Start a new approval round.
- Replace the document.

Procedure

1. Go the **Tasks** area and click on the name of the appropriate task.
2. Choose **Action** > **View Task Details**. Select the appropriate actions from the **Approval Task** page.

Task overview: Management of Approval Tasks [page 336]

Related Information

Creating Approval Tasks [page 337]
Editing and Submiting Approval Tasks Inherited from Templates [page 339]
Viewing the Status of Approval Flows [page 340]
Processing Denials for Approval Tasks [page 341]
Withdrawing an Approval Round [page 343]

Processing Denials for Approval Tasks

Use this procedure to process denials for approval tasks.

Procedure

1. In the **Tasks** area, click on the name of the appropriate task. Choose **Action** > **View Task Details**.

2. SAP Ariba opens an **Approval Task** page.
3. If the approver attached a revised file, the file is attached to the task but is not incorporated as a new version of the document. The task owner must review the changes and create a new version of the document stored in SAP Ariba to incorporate changes from the approver.

   If the file is a Microsoft Word document, you can click **Review Change** in the right window pane or under the **Task History** tab. SAP Ariba merges the revised file with the current version of the document in the SAP Ariba system and opens the file with the Microsoft Word Track Changes feature enabled. Microsoft Word highlights the changes and displays a Reviewing toolbar similar to the following:

   Use the icons in the Reviewing toolbar to navigate the changes and accept or reject each change. Save the file and exit Microsoft Word.

   > **Note**
   >
   > SAP Ariba recommends that you use the Review Change feature only if you can confirm that you are using a Word version which is the same or newer than the version used by the reviewer. Merging Microsoft Word files that were opened using different Microsoft Word versions can cause unexpected results and lost data. For more information, see About Document Tasks and the Review Change Feature [page 312].

   If the file is not a Microsoft Word document, use the appropriate application to open the file and make modifications to the document as needed. Save the file and exit the application.
4. SAP Ariba opens a **Document Update** window. Click **Update Now**.
5. SAP Ariba opens a window for you to create a new version of the document.

   Click ▶ **Yes, save as v** ▶ **n** ▶ (where **n** is the next version number for the document).

   Enter a description of your changes and click **Save**.

   SAP Ariba returns to the **Approval Task** page.
6. (Optional) View comments from other approvers by opening the **Task History** tab.
7. Click **New Round**. SAP Ariba opens an **Approval Task** page. Add any comments and update the due date and other fields as needed. You can also replace the document by clicking on the document name and selecting **Replace Document**.
8. Click **Submit**.

Task overview: Management of Approval Tasks [page 336]

Related Information

Creating Approval Tasks [page 337]
Editing and Submiting Approval Tasks Inherited from Templates [page 339]
Viewing the Status of Approval Flows [page 340]
Processing Approvals for Approval Tasks [page 341]
Withdrawing an Approval Round [page 343]

Withdrawing an Approval Round

Use this procedure to withdraw an approval round.

Context

If an approval round has been started but not all approvers have responded and no approvers have denied the task, the task owner can withdraw the approval round. This feature is useful if you want to stop an approval round to create a new version of the document for approval. When you are ready to send the document for approval again, you can start a new approval round.

Procedure

1. From the **My Tasks** area, click on the task name and choose **Action** > **View Task Details**.
2. Click **Withdraw**.

Task overview: Management of Approval Tasks [page 336]

Related Information

Creating Approval Tasks [page 337]
Editing and Submiting Approval Tasks Inherited from Templates [page 339]
Viewing the Status of Approval Flows [page 340]
Processing Approvals for Approval Tasks [page 341]
Processing Denials for Approval Tasks [page 341]

Management of Negotiation Tasks

This topic describes how to manage negotiation tasks. For general information about all task types and task options, see About Tasks [page 300].

The negotiation task workflow includes the following steps:

1. A project owner submits a negotiation task that the project inherited from its template. The task can also be submitted by user in a group specified in the Owner field for the task.
   Alternatively, a project owner creates a new task in a project.
   By default, a document cannot be in the Not Edited state when a task is submitted; the project owner must open or publish the document before submitting the task. For information about changing this requirement, see Application.ACM.TasksAllowSubmissionOfUneditedDocuments [page 431].

2. SAP Ariba adds the task to the task list for the parties negotiating the contract (the negotiation reviewers). SAP Ariba also sends an email to the reviewers with the document attached. (If the approval flow contains serial reviewers, SAP Ariba initially performs these operations only for reviewers that have no predecessors, and then performs these operations for users in the subsequent approval nodes as the approval flow progresses.)
3. Each negotiation reviewer accepts the document or offers a counterproposal. If a negotiation reviewer offers a counterproposal, he or she can submit a modified document and any comments. SAP Ariba attaches the modified document to the task.
4. The task owner views the details for the task and processes the responses.
   The task owner can:
   - View comments from a negotiation reviewer.
   - Review a counterproposal sent in a modified document from the negotiation reviewer. If the document is a Microsoft Word document, SAP Ariba can merge the modified document with the current document in the SAP Ariba system and create a new document with Microsoft Word Track Changes feature enabled and the changes highlighted. The task owner can use the Track Changes feature to accept or reject each change, then save the document as a new version in the system.
   - Create a new negotiation round.
   - Attach a counterproposal received from an external reviewer. The task owner submits a modified document and comments on behalf of the external reviewer.
   - Mark the task complete. If the document was not modified during the negotiation rounds and was not in the published state, the task owner can publish the document from the task details page.

Creating Negotiation Tasks [page 344]

Editing and Submiting Negotiation Tasks Inherited from Templates [page 346]

Viewing the Status of Review Flows [page 347]

Processing Negotiation Rounds from Internal Reviewers [page 348]

Processing Negotiation Rounds from External Reviewers [page 349]

Creating Negotiation Tasks

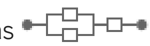
Use this procedure to create negotiation tasks.

Procedure

1. To create a negotiation task for a document, navigate to the **Documents** tab. Click a document name and choose **Create New Task** > **Negotiation**.

   To create a negotiation task for the entire project, navigate to the Overview area. Choose **Actions** > **View Details**. From the Tasks area, choose **Actions** > **Create New Task** > **Negotiation**.

   SAP Ariba opens a **New Negotiation Task for** *document_name* page, where *document_name* is the name of the document.
2. Enter a title and description for the task.
3. If reviewers were not specified in the template, add reviewers using one of the following methods:

- Add reviewers in the editable **Reviewers** field. If you use this method, you can add only parallel or serial reviewers, but not both parallel and serial reviewers. SAP Ariba does not expand any groups added to the flow. For additional information about restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
    - Click the radio button next to **Parallel** or **Serial** to specify the type of approvers you want to add.
    - Click the arrow for the **Reviewers** field to display possible choices. A reviewer can be an internal user or an external user already configured in the system.
      To add an email address for an external reviewer not already configured in the system, click **New External Reviewer**.
      If you specify multiple serial reviewers, add the reviewers in the order you want them to review the document (the first reviewer you specify will be the first reviewer in the review flow).
- Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as ) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414].

For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].

4. Choose any observers. Observers can view the task and attach documents to the task but do not have to review the document. For more information about observers, see Task Owners and Participants [page 307].
5. Specify a due date for the task.
6. Specify if the task is a milestone. For more information about milestones, see About Task Milestones [page 314].
7. Specify if the task is required. Required tasks cannot be cancelled. Required tasks in SAP Ariba Contracts workspaces must be completed before the workspace can be published. For more information about required tasks, see About Required and Optional Task Types [page 311].
8. Specify predecessor tasks. These are the tasks that must be completed before the negotiation task can start. See Using Predecessor Tasks and Phases [page 404] for details.
9. If you specified predecessor tasks or phases, you can select the **Start When Dependencies Complete** option to make this a self-starting task. Self-starting tasks automatically start if all predecessors are completed and the document associated with the task is in the **Draft** or **Published** state. See Using Self-Starting Tasks and Phases [page 405] for details.
10. If the document is a Main Agreement or Contract Addendum and all reviewers are external reviewers (reviewers who do not have an SAP Ariba sign in account), you can select **Send Clean Document to Email Reviewers** to generate a clean version of the document that is sent in the email to the reviewers.

    A "clean" document does not contain red lines or other markers to indicate changes made in previous versions. In addition, document property fields are replaced with literal text. The clean document is sent only to external reviewers; the document in stored in the project retains red lines and document property fields.

    > ⓘ Note
    >
    > If you select **Send Clean Document to Email Reviewers** and task has internal reviewers, you will get an error when you attempt to submit the task.

11. Enter a message to the reviewers. You can also include additional files as attachments. (Attachment files are not indexed for keyword searching.)
12. (Optional) Expand **Advanced Task Details** to configure the following features:
    - Document lock
    - Notifications for comments
    - Display order

- Alert icon
  For more information, see Configuring Advanced Task Details [page 391].
13. To view or modify the notification parameters that determine the time intervals for sending notifications for the task, expand **Notifications**. For more information, see Using Task Notification Profiles and Parameters [page 419].
14. Click **OK**.

Task overview: Management of Negotiation Tasks [page 343]

Related Information

Editing and Submiting Negotiation Tasks Inherited from Templates [page 346]
Viewing the Status of Review Flows [page 347]
Processing Negotiation Rounds from Internal Reviewers [page 348]
Processing Negotiation Rounds from External Reviewers [page 349]

Editing and Submiting Negotiation Tasks Inherited from Templates

Use this procedure to edit and submit negotiation tasks inherited from templates.

Context

A project can contain tasks inherited from its project template. You must submit these tasks to start them. You can also edit these tasks with the following exceptions:

- If a template author makes a task required in a template, you cannot make the task optional in a project.
- You cannot remove reviewers specified in the template.

To submit a negotiation task:

Procedure

1. Navigate to the **Tasks** area. Click the name of the task you want to submit and choose **View Task Details**.

   SAP Ariba opens a **Negotiation Task** page. SAP Ariba displays different fields depending on the presence of reviewers in the template task and the state of the document.
2. If reviewers were specified in the template and you want to add reviewers, the screen includes a **Negotiation Flow** tab. Click this tab to open the approval flow editor and add reviewers.

If reviewers were not specified in the template, add reviewers using one of the following methods:

- Add reviewers in the editable **Reviewers** field. If you use this method, you can add only parallel or serial reviewers, but not both parallel and serial reviewers. SAP Ariba does not expand any groups added to the flow. For additional information about restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].
- Choose a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as) to open the approval flow editor. For more information, see Opening the Approval Flow Editor [page 414]. For more information about approval flows, see About Approval, Review, and Negotiation Flows [page 408].

3. Edit or complete values for the remaining fields as described in Creating a Negotiation Task [page 344].
4. Click **Submit**.

Task overview: Management of Negotiation Tasks [page 343]

Related Information

Creating Negotiation Tasks [page 344]
Viewing the Status of Review Flows [page 347]
Processing Negotiation Rounds from Internal Reviewers [page 348]
Processing Negotiation Rounds from External Reviewers [page 349]

Viewing the Status of Review Flows

Use this procedure to view who has reviewed the document and which reviewers have not yet reviewed the document.

Procedure

1. Click the task name under the **Tasks** tab.
2. Select **View Task Details**.
3. Click the **Negotiation Flow** tab.

   See About the Status of Approvers in Approval Flows [page 410] for an example approval flow and how to interpret an approval (review) flow.

Task overview: Management of Negotiation Tasks [page 343]

Related Information

[Creating Negotiation Tasks [page 344]]
[Editing and Submiting Negotiation Tasks Inherited from Templates [page 346]]
[Processing Negotiation Rounds from Internal Reviewers [page 348]]
[Processing Negotiation Rounds from External Reviewers [page 349]]

Processing Negotiation Rounds from Internal Reviewers

Use this procedure to process negotiation rounds from internal reviewers.

Procedure

1. In the Overview area on the **Overview** project tab, choose **Actions** > **View Details**.
2. In the Tasks area, click on the name of the appropriate task. Choose **Action** > **View Task Details**.
3. If internal reviewers responded and attached a modified document as a counterproposal, SAP Ariba displays a page with a link to the counterproposal on the left.

   The counterproposal is attached to the task but is not incorporated as a new version of the document. To incorporate changes from the counterproposal, you must review the changes and create a new version of the document stored in the SAP Ariba system. This is similar to the procedure described in Processing Reviews from Internal Reviewers Without Edit Access [page 329].

Task overview: Management of Negotiation Tasks [page 343]

Related Information

Creating Negotiation Tasks [page 344]
Editing and Submiting Negotiation Tasks Inherited from Templates [page 346]
Viewing the Status of Review Flows [page 347]
Processing Negotiation Rounds from External Reviewers [page 349]

Processing Negotiation Rounds from External Reviewers

Use this procedure to process negotiation rounds from external reviewers.

Procedure

1. If you received a counterproposal from the external reviewer, save the file to your file system.

   Do not use any of the following special characters in the file name:

   `\ / : ? “ < > | # + % &`

   > → Tip
   >
   > If the external reviewer uses a version of Microsoft Word that is different than your version or you cannot confirm the reviewer’s Microsoft Word version, convert and store the document using your Microsoft Word version, if possible. For more information, see Microsoft Word Integration with SAP Ariba [page 280].

2. In the Overview area on the **Overview** project tab, choose **Actions** > **View Details**.
3. In the Tasks area, click on the name of the appropriate task. Choose **Action** > **View Task Details**.

   SAP Ariba displays a **Negotiation Task** page.
4. Choose the appropriate action:
   - **Attach Reviewer’s Counter Proposal**
     SAP Ariba opens a **Counter Proposal** page that enables you to submit the reviewer’s modified document file and comments on his or her behalf. This page is similar to the Review Task page used to process comments from external reviewers for review tasks, as described in Processing Reviews from External Reviewers [page 332].
   - **New Round**
     Start a new negotiation round. SAP Ariba opens a **Negotiation Task** page. Add any comments and update the due date and other fields as needed. You can also replace the document by clicking on the document name and selecting **Replace Document**.
   - **Accept Proposal**
     You accept the proposal on behalf of the external reviewer.
   - **Mark Complete**
     Mark the task complete. After you have marked the task complete, you can view the task details again to start a new round, replace the document, or publish the document (if it is not already published).

Task overview: Management of Negotiation Tasks [page 343]

Related Information

Creating Negotiation Tasks [page 344]
Editing and Submiting Negotiation Tasks Inherited from Templates [page 346]

Viewing the Status of Review Flows [page 347]
Processing Negotiation Rounds from Internal Reviewers [page 348]

Management of Publish Document Tasks

This topic discusses how to manage publish document tasks. For general information about all task types and task options, see About Tasks [page 300].

Publish document tasks allow you to schedule the automatic publication of surveys for any project type.

You can change the scheduled publication date for any survey that hasn't yet been published by editing the publish document task for that survey. You can edit any publish document task, including any that are created automatically when a project is created.

You can add publish document tasks to phases. Publish document tasks are only related to phases as follows:

- You can include a publish document task in a phase and schedule the document publish date based on the phase start date. Refer to Scheduling Surveys for Automatic Publication [page 351] for details.
- You can add a publish document task to a recurring phase, and each new occurrence of the phase also includes another instance of the task.

There is no other relationship between a publish document task and the phase that contains it. For example:

- The start of a publish document task in a phase doesn't start the phase.
- Users can start a publish document task in a phase even if the phase hasn't been started.
- A phase can complete even if the publish document task hasn't completed.
- Publish document tasks don't affect the autocompletion of a phase. If autocompletion of a phase is enabled (the default behavior, controlled by the site configuration parameter `Application.ACM.PhaseAutoComplete`, which is set for you by SAP Ariba), the phase is marked complete if all required tasks other than publish document tasks are complete (the phase is marked complete regardless of the status of the publish document tasks).

Scheduling Surveys for Automatic Publication [page 351]

Changing the Scheduled Publication Date for Surveys [page 352]

Canceling Publish Document Tasks [page 353]

Marking Publish Document Tasks Complete [page 353]

Scheduling Surveys for Automatic Publication

Use this procedure to schedule surveys for automatic publication.

Procedure

1. Navigate to the **Documents** area of your project.
2. Click the survey name and choose **Action** > **Create New Task** > **Publish Document**.

   > Note
   >
   > The **Publish Document** option is not available for surveys whose status is Open or Completed, or where a survey has been published previously.

3. (Optional) Edit the task title and enter a task description. The task title includes the name of the survey that is to be published by default.
4. For **Document Publish Date**, choose one of the following options:
   - **Days after parent phase starts**.You can set this task to publish the survey a specified number of days after another phase on the current project has started. For example, if you want the survey to be published 30 days after the project start date, select this radio button and enter 30.
   - **Fixed Date**. Enter a fixed publication date, or click the calendar icon and select a date.
   - **Selected Date Field**. Click **Select Date Field** and choose **Select** for any of the following available date fields:

Field	Description
Parent Phase | **Committed Due Date**	The committed due date of the parent phase.
Parent Phase | **Due Date**	The due date of the parent phase.
Parent Phase | **End Date**	The end date of the parent phase.
Parent Phase | **Planned Start Date**	The planned start date of the parent phase.
Parent Phase | **Start Date**	The start date of the parent phase.

   > Note
   >
   > When working with a specific project type, the Selected Date Field options that you see may be different from the listed options.

   If you choose the **Selected Date Field** option, you then have the option to specify a document publish date offset. For example, say you selected **Parent Phase** | **Start Date** as the selected date field and you want the survey to be published 30 days after that date. Enter 30 in the **Document Publish Date Offset** field and select **After** from the pull-down list.
   In the options described above, the parent phase is the task preceding the current task in a hierarchy of tasks or, if there is no preceding task, the parent phase is the project. For example, if there is no preceding task and you select **Parent Phase** | **End Date**, you are selecting the end date of the project as the publication date of the event.

5. (Optional) If you want to ensure that a particular task is completed before the survey can be published, click **select** in the **Predecessors** field, click the expand arrow (▷) to expand a task list, choose a task and click **OK**.
6. Click **OK**.

Results

The new task is listed on the **Tasks** tab of the project. The task status is **Publication Scheduled**.

Task overview: Management of Publish Document Tasks [page 350]

Related Information

Changing the Scheduled Publication Date for Surveys [page 352]
Canceling Publish Document Tasks [page 353]
Marking Publish Document Tasks Complete [page 353]

Changing the Scheduled Publication Date for Surveys

Use this procedure to change the scheduled publication date for surveys.

Procedure

1. Navigate to the **Tasks** area.
2. Click the relevant publish document task and select **Edit Task**.
3. Change the **Document Publish Date** and/or **Document Publish Date Offset** as required.
4. Click **OK**.

Task overview: Management of Publish Document Tasks [page 350]

Related Information

Scheduling Surveys for Automatic Publication [page 351]
Canceling Publish Document Tasks [page 353]
Marking Publish Document Tasks Complete [page 353]

Canceling Publish Document Tasks

Use this procedure to cancel publish document tasks.

Procedure

1. Navigate to the **Tasks** area.
2. Click the relevant publish document task and select **View Task Details**.
3. Click **Cancel Schedule**.

Results

The task remains available, but inactive, in the **Tasks** area of the **Overview** tab and on the **Tasks** tab of the project.

Task overview: Management of Publish Document Tasks [page 350]

Related Information

Scheduling Surveys for Automatic Publication [page 351]
Changing the Scheduled Publication Date for Surveys [page 352]
Marking Publish Document Tasks Complete [page 353]

Marking Publish Document Tasks Complete

Use this procedure to mark publish document tasks complete.

Procedure

1. Navigate to the **Tasks** area.
2. Click the relevant publish document task and select **View Task Details**.
3. Click **Mark Complete** and then click **OK**.

Results

The task is closed and it cannot be resumed. To reschedule automatic publication for a survey or survey template, you must create a new publish document task.

Task overview: Management of Publish Document Tasks [page 350]

Related Information

Scheduling Surveys for Automatic Publication [page 351]
Changing the Scheduled Publication Date for Surveys [page 352]
Canceling Publish Document Tasks [page 353]

Management of Signature Tasks

This topic discusses how to manage signature tasks. For general information about all task types and task options, see About Tasks [page 300].

Signature tasks enable you to collect electronic signatures from internal and external signers for a document in an SAP Ariba Contracts workspace. An electronically-signed contract can designate a specific version as the official, agreed-upon version, understood by all parties to be the version that is in effect. After a document has been electronically signed, no one can modify the document without invalidating the electronic signature. If a signed document is modified, it must be re-signed by all required signers.

Signature tasks are an add-on feature for SAP Ariba Contracts. SAP Ariba Contracts provides signature tasks using the following electronic signature providers:

- DocuSign
- Adobe Sign

Signature tasks support the following features:

- Signature tasks can be created for documents with various formats including:
  - Microsoft Word (DOC and DOCX)
  - Microsoft Excel (XLS and XLSX)
  - Portable Document Format (PDF)
  - Text (TXT)
  - Rich Text Format (RTF)
  - Portable Network Graphics (PNG)
  - Graphics Interchange Format (GIF)
- A signature task can be created for one document or all documents in a project folder. If a signature task is created for a folder, all top-level documents in the folder (documents not in subfolders) are converted and concatenated into a single PDF file.

- Support for paper signatures. When paper signatures are configured, a file can be submitted with an electronic image of a “wet” signature (an image of a signature originally stroked on a paper document, using wet or pen ink). You can create a signature task as a paper signature or you can complete a signature task created using an electronic signature provider using a paper signature. For more information, see Managing Paper Signature Tasks [page 380].
- The Adobe Sign signature service is supported with a drag-and-drop interface that allows you to add fields for signatures, initials, user data and more. Adobe Sign also supports Signer Identity Verification, a second form of authentication that requires a password to be entered.
- The DocuSign pass-through interface enables you to configure signatures at the DocuSign website. The drag-and-drop interface of DocuSign website allows you to easily add tags for signatures, initials, and data. The DocuSign website also allows you to easily create templates to re-use documents with the same fields (tags) for signatures, initials, and information (user data fields). The DocuSign website also supports a feature to authenticate signers. DocuSign also allows customers to add a second form of authentication by requiring a Shared Secret or Access Code to be entered.

Actions Available on the Signature Providers’ Websites

Depending on the signature provider you are using, you can perform the following actions on the signature provider website:

- Add / Update documents.
- Add / Update signers (recipients).
- Setup recipient authentication – level 2.

- Select actions that signers can perform.
- Set additional parameters such as reminders.
- Add / Update subject and message body.
- Place tags for signatures and other information like date/time in the document.
- Create and place custom tags.
- Edit settings.
- Add a Note.
- Select matching template.
- Align pages of the document for signing.
- Adjust and align tags.
- Save the draft.
- Discard changes.
- Alert/ Change Alert settings.
- Preview and Send for signing.

For specific information about the actions available, see the documentation for your electronic signature provider.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Signature Task Workflow [page 357]
Use of OAuth Authentication Method for DocuSign [page 358]
Use of Advanced Signature Types in DocuSign [page 361]
Restriction of Users from Changing the Signature Provider and Dictating the Use of Particular Electronic Signature Types with DocuSign [page 363]
Use of OAuth Authentication Method for Adobe Sign [page 369]
Creating Signature Tasks [page 371]
Starting a New Round for Signature Tasks [page 375]
Withdrawing Signature Tasks [page 376]
Updating the Status of Signature Tasks [page 377]
Viewing Signature Tasks on the Signature Provider's Website [page 378]
Editing Signature Tasks [page 379]
Paper Signature Tasks [page 380]
Creating Paper Signature Tasks [page 381]
Completing Paper Signature Tasks [page 382]
Completing Electronic Signature Tasks with Wet Ink (Paper) Signatures [page 383]

Signature Task Workflow

The electronic signature workflow is as follows:

- Using the SAP Ariba interface, create a signature task for a single document or a folder with multiple documents.
- Submit the task. If you are using DocuSign, you are transferred to the DocuSign website; if you are using Adobe Sign, a new browser window opens to the Adobe Sign website.
- At the DocuSign or Adobe Sign website, you can specify where signers will place their signatures or initials. On the DocuSign website, you can also specify additional signers and an order in which signers receive and sign the document.
- You send the document from the DocuSign or Adobe Sign website.
- Signers receive notifications asking them to navigate to the DocuSign or Adobe Sign site to sign the document.
- Signers sign or decline the documents.
- If all signers have signed the document, the SAP Ariba interface shows the document status as Signed.
- You can edit, withdraw or start a new round of the signature task if required.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]
Use of OAuth Authentication Method for DocuSign [page 358]
Use of Advanced Signature Types in DocuSign [page 361]
Restriction of Users from Changing the Signature Provider and Dictating the Use of Particular Electronic Signature Types with DocuSign [page 363]
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Completing Electronic Signature Tasks with Wet Ink (Paper) Signatures [page 383]
Creating a Signature Task [page 371]
Starting a New Round for a Signature Task [page 375]
Withdrawing a Signature Task [page 376]
Updating the Status of Signature Tasks [page 377]
Viewing a Signature Task on the Signature Provider's Website [page 378]
Editing a Signature Task [page 379]

Use of OAuth Authentication Method for DocuSign

SAP Ariba Contracts integrated with DocuSign can use the OAuth 2.0 authentication method to send contracts to DocuSign for electronic signatures. The OAuth authentication method allows you to access the DocuSign application with unique access tokens that are dynamically generated for each DocuSign user.

To use OAuth authentication, you must enable the `Application.ACM.Signature.DocuSignREST.OAuth.Enabled` parameter in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Contracts solution. For information about the parameter, see Enable OAuth authentication for DocuSign in SAP Ariba Contracts. You also need to contact your site administrator to grant consent for OAuth in SAP Ariba Contracts. For information about granting consent for OAuth, see How to grant admin-user consent for OAuth in SAP Ariba Contracts in the Contract Administration Guide.

When you initiate a signature task (Submit, New Round, Withdraw, Edit, or Refresh) for contracts from the contract workspace, you will be prompted with a DocuSign sign in page, followed by a user consent page. The DocuSign sign in page and the user consent page appears only once for a new user who initiates a signature task for a contract for the first time. You must ensure to grant access to OAuth authentication in the user consent page. For more information, see Granting User Consent for OAuth from the Contract Workspace [page 360].

After you grant access to OAuth authentication in the user consent page, you will be redirected to the **Signature Tasks** page, where you can resubmit a contract for new round, update, or withdrawal, to DocuSign as per your business requirements. When you resubmit a signature task after granting consent to the OAuth authentication method, you will automatically be directed to the DocuSign application.

OAuth authentication method is also implemented for Non-Disclosure Agreement contracts in SAP Ariba Contracts. Users are prompted with the DocuSign sign in page and the user consent page when a signature task is submitted for an NDA contract. For more information, see Management of Non-Disclosure Agreement Contracts [page 80].

ⓘ Note

- Batch jobs are used to retrieve the status of all the signature tasks from DocuSign and to download the signed documents from DocuSign. Batch jobs are automatically triggered based on the customer configuration in SAP Ariba Contracts. As part of this feature, when a batch job is triggered, only the administrator credentials are used to retrieve information from DocuSign.
- If you have added self-starting signature tasks, ensure to grant consent to OAuth authentication. Else, the self-starting signature task will fail. For example, if your contract workspace consists of Task1 created by User1 and a self-starting task, Task2, created by User2, after the Task1 is complete, Task2 is automatically initiated. For Task2 to be initiated seamlessly, User2 must have granted consent to OAuth authentication. Else, Task2 will fail.

Prerequisites

- You must enable DocuSign for electronic signatures in your site and also specify the administrator's DocuSign account ID in SAP Ariba Contracts. If you do not know the DocuSign account ID, check with DocuSign.

> ⓘ Note
>
> Your organization must have a single administrator account with DocuSign. The account ID will be the ID for the administrator account with DocuSign. For more information, see Enabling Electronic Signatures in Contracts in Contract Administration Guide.

- To use OAuth authentication method:
  - Enable the `Application.ACM.Signature.DocuSignREST.OAuth.Enabled` parameter in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Contracts solution.
  - To send contracts from SAP Ariba Contracts to DocuSign for electronic signatures, you must have your site administrator grant access to OAuth authentication in the SAP Ariba Administrator page. See How to grant an admin user consent for OAuth in SAP Ariba Contracts in Contract Administration Guide.
- To send a contract document to DocuSign for electronic signatures, the task owner must have a DocuSign user associated with the company's administrator account. This account must be registered to the same email account configured for the task owner on the SAP Ariba server. If the new DocuSign user is not associated with the company's administrator user account, then the admin-user must manually associate the DocuSign user with the company's administrator account before submitting a signature task.
- The Non-Disclosure Agreement Contract functionality requires your Designated Support Contact (DSC) submit a Service Request (SR). An SAP Ariba Support representative will follow up to complete the request. You must be a part of either the **NDA User** or the **NDA Admin User** group to be able to administer NDAs.

Restrictions

- You cannot submit a signature task in SAP Ariba Contracts without the admin-user consent for OAuth. If you try to submit a signature task for a contract without the admin-user consent for OAuth, the following error is displayed:
  `Admin consent is required.`
  The error is displayed for any type of signature task submitted without the admin-user consent; signature tasks such as Submit, New Round, Withdrawal, Update, and so on.

  > ⓘ Note
  >
  > This restriction is also applicable to a signature task initiated for an NDA contract. Users cannot send an NDA contract to DocuSign or revoke an NDA contract from DocuSign without the admin-user consent for OAuth.

- Users cannot send a contract document for electronic signatures from SAP Ariba Contracts to DocuSign if they do not have a DocuSign user account. The **Automatically Create User** option is no longer available to automatically create a DocuSign user account when a user sends the contract document for electronic signatures to DocuSign.
- The admin-user in SAP Ariba Contracts, who configures the integration between SAP Ariba Contracts and DocuSign must be a registered user in SAP Ariba Contracts and DocuSign. If the registered admin-user no longer exists in the customer's DocuSign account, the integration between SAP Ariba Contracts and DocuSign must be reconfigured by the new admin-user.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]
Signature Task Workflow [page 357]
Use of Advanced Signature Types in DocuSign [page 361]
Restriction of Users from Changing the Signature Provider and Dictating the Use of Particular Electronic Signature Types with DocuSign [page 363]
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Granting User Consent for OAuth from the Contract Workspace

Use this procedure to grant user consent for OAuth from the contract workspace.

Prerequisites

- Your site must be enabled to use the OAuth authentication method.
- Your site administrator must have granted access for OAuth in the SAP Ariba Administrator page.

Context

Buyers can create signature tasks to resubmit a contract to DocuSign, withdraw a contract from DocuSign, or update a contract in DocuSign. When a buyer initiates a signature task for the first time, with the OAuth authentication method enabled, an error is displayed. This topic assumes that the buyer is sending a contract document to DocuSign for electronic signatures by creating a signature task in the contract workspace.

Procedure

1. In the Contracts Workspace, create and publish a signature task for a contract document. For more information, see Creating Signature Tasks [page 371] in Managing Projects, Teams, Documents, and Tasks [page 10].

   If the action is initiated by the buyer for the first time, then the following error is displayed:

   ```
   Unable to send <contract name> to DocuSign for Signature.
   User has not provided consent to DocuSign. You'll be redirected to
   DocuSign to get consent.
   ```
2. Click **OK**.

   Buyer will be redirected to the DocuSign sign in page.
3. Enter the user name and click **Continue**.
4. Enter the password and click **LOG IN**.

   The DocuSign user consent page for SAP Ariba is displayed.
5. Click **Accept**.

   Buyer will be redirected to the **Signature Tasks** page in SAP Ariba Contracts. Buyer can now resubmit the contract for electronic signatures.

Use of Advanced Signature Types in DocuSign

When SAP Ariba Contracts is integrated with DocuSign, buyers can send documents from SAP Ariba Contracts to DocuSign for eSignatures. Buyers are redirected to the DocuSign website when they submit a document for eSignature from SAP Ariba Contracts.

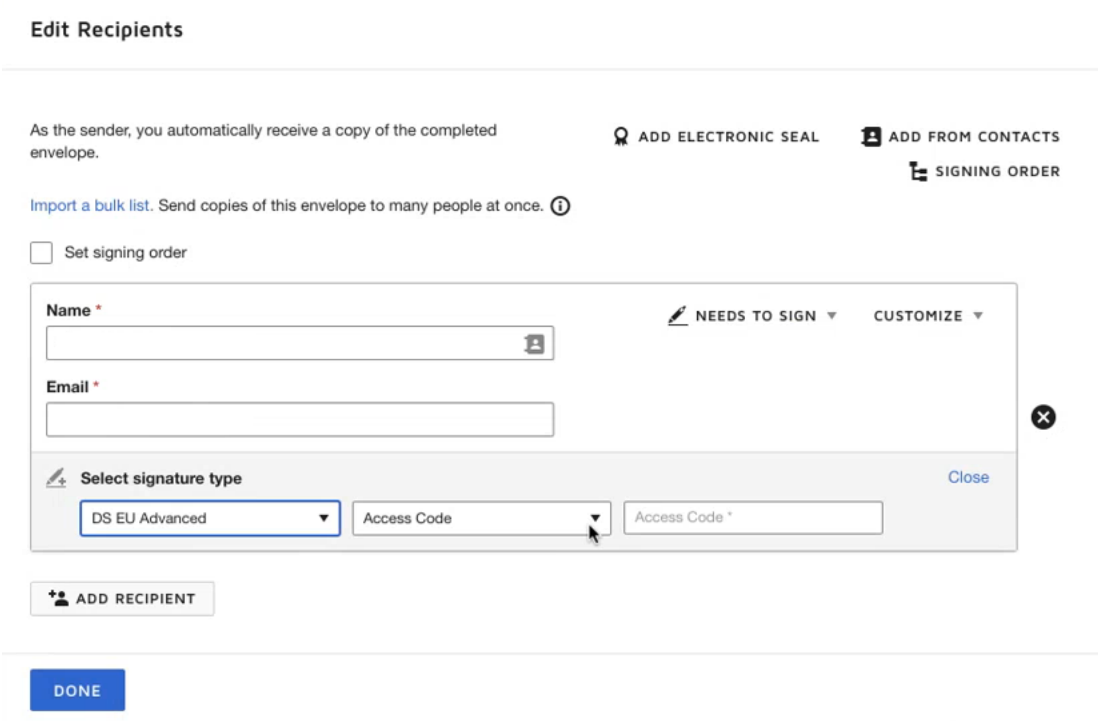
The DocuSign website allows buyers to add and update recipients and also authenticate signers. DocuSign also allows buyers to add advanced signature types which provides a second form of authentication by requiring a Shared Secret or Access Code to be entered. For more information about the actions available in DocuSign website, see Management of Signature Tasks [page 354].

Buyers can add advanced signature types in the **Edit Recipients** view of the DocuSign application. Buyers can be redirected to the **Edit Recipients** view of the DocuSign application upon submitting a document for eSignature.
To redirect buyers to the **Edit Recipients** view, you must set the following parameters to **Yes** in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Contracts application:

- `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView.Enabled`
- (Optional) `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView`

For more information about enabling the parameters, see Intelligent Configuration Manager parameters reference guide.

When buyers initiate a signature task for a document from SAP Ariba Contracts with the above parameters set to **Yes**, buyers are redirected to the **Edit Recipients** view in DocuSign, by default. The **Edit Recipients** view allows buyers to configure the signature type for individual recipients before submitting the document for eSignature. Buyers can select the advanced signature type and enter the authentication details in the **Edit Recipients** view. For example, buyers can select the advanced signature type, **DS EU Advanced**, and enter the associated authentication details such as the access code, phone number, and so on in the **Edit Recipients** view.



When the optional parameter, `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` is disabled, buyers can redirect users to the **Edit Recipients** view from the **Create Signature Task** page of the contract workspace. The **Create Signature Task** page provides an attribute, **Redirect to Edit Recipients View**, to redirect users to the **Edit Recipients** view in DocuSign. This attribute allows buyers to override the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter value.

To redirect users to the **Edit Recipients** view from the **Create Signature Task** page, you can do one of the following:

- Set the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter value to **Yes** in your site. When the parameter is set to **Yes**, users are redirected to the **Edit Recipients** view by default upon submitting a document for eSignature.
  When the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter is set to **Yes**, the attribute **Redirect to Edit Recipients View** in the **Create Signature Task** page of the contract workspace is automatically set to **Yes** by default and is non-editable.
- When the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter is set to **No**, buyers can override the set parameter value by selecting the **Redirect to Edit Recipients View** attribute value in the **Create Signature Task** page of the contract workspace to **Yes**. If the **Redirect to Edit Recipients View** attribute is set to **No**, buyers are redirected to the Sender view of the DocuSign application.

For existing signature tasks in a contract workspace, if the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter is set to **Yes**, then the application overrides the **Redirect to the Edit Recipients view** attribute value for any of the existing signature tasks to **Yes**. The **Task History** tab of the signature task in SAP Ariba Contracts displays the details of the update.

ⓘ Note

If you create a new signature task when the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter value is set to **Yes**, then the **Redirect to the Edit Recipients view** attribute value in the contract workspace is set to **Yes** by default and this task will not have a corresponding entry in the **Task History**.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]
Signature Task Workflow [page 357]
Use of OAuth Authentication Method for DocuSign [page 358]
Restriction of Users from Changing the Signature Provider and Dictating the Use of Particular Electronic Signature Types with DocuSign [page 363]
Use of OAuth Authentication Method for Adobe Sign [page 369]
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Restriction of Users from Changing the Signature Provider and Dictating the Use of Particular Electronic Signature Types with DocuSign

To comply with security guidelines, buyers can pre-select a signature provider in a contract workspace template or contract workspace and restrict users from changing the signature provider. Buyers can also dictate the use of particular electronic signature types with DocuSign.

The template creator can configure the following in a contract workspace template:

- Choose a signature provider for a signature task of a document and restrict users from changing the signature provider in the contract workspace
- Choose one or more signature types and restrict users from changing the signature type in subsequent rounds of the signature task

SAP Ariba Contracts sends the selected signature types to DocuSign to set the default signature types on the DocuSign website.

> ⓘ Note
>
> This is applicable only for DocuSign as the signature provider.

- Restrict users from creating an ad hoc signature task

If the contract owner creates a contract workspace using a template where the option Restrict users from changing the signature provider is not enabled, then this option is available when the contract owner creates a signature task for a document in a contract workspace. The contract owner can choose a signature provider in the contract workspace and restrict other users from changing it. The contract owner can also choose the signature type for DocuSign but cannot restrict users from changing the signature type in subsequent rounds of the signature task.

Prerequisites

- You must be a member of the Template Creator group or a contract owner.
- Enable DocuSign for electronic signatures on your site and also specify the administrator's DocuSign account ID and email ID in SAP Ariba Contracts. If you do not know the DocuSign account ID, check with DocuSign.

> ⓘ Note
>
> Your organization must have a single administrator account with DocuSign. The account ID will be the ID for the administrator account with DocuSign. For more information, see Enabling Electronic Signatures in Contracts in Contract Administration Guide.

- Enable the feature **SC-9402: Implement OAUTH authentication between Ariba and DocuSign environments** for the following DocuSign-related capabilities:
  - Setting the default signature types for DocuSign
  - Choosing signature types in SAP Ariba Contracts for DocuSign
  - Restricting users from changing the signature type in subsequent rounds of the signature task

  Ensure that you have your site administrator grant access to the OAuth authentication in the SAP Ariba Administrator page. See How to grant admin-user consent for OAuth in SAP Ariba Contracts.
- If you have a standards-based subscription (SBS) with DocuSign and want to use Advanced Signature types, enable the `Application.ACM.Signature.DocuSignREST.SBSEnabled` parameter on the **Manage > Administration > Customization Manager > Parameters** page. You can also enable the parameter on the **Manage > Administration > Project Manager > Signature Provider** page of the SAP Ariba Contracts solution. If SBS is enabled, then the signature task must have at least one default signature type.

> ⓘ Note
>
> If you enable the `Application.ACM.Signature.DocuSignREST.SBSEnabled` parameter without having the SBS subscription, then the signature task will fail.

- Enable the following parameters on the **Manage > Administration > Intelligent Configuration Manager > Parameters** page :

Parameter	Value
Application.ACM.Signature.DocuSignREST.Enabled	Yes
Application.ACM.Signature.DocuSignREST.OAuth.Enabled	Yes

Restrictions

Although the selection of signature type is restricted in SAP Ariba Contracts, the user can change the signature type in DocuSign.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]
Signature Task Workflow [page 357]
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Use of Advanced Signature Types in DocuSign [page 361]
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Restricting Users from Changing the Signature Provider

This topic explains how template creators can restrict other users from changing the signature provider in a contract workspace.

Context

The template creator can choose a signature provider in the contract workspace template and restrict users from changing the signature provider in the contract workspace. If this is not set in the contract workspace template, the contract owner can set the restriction at the contract workspace level.

Procedure

1. In a contract workspace template or a contract workspace, navigate to the **Documents** tab.
2. Click the document for which you want to create a signature task and then navigate to **Create New Task** > **Signature**.

   The electronic signature provider selection window displays the options that have been configured for your site. The selection window appears only if more than one signature provider (including Paper signature) is configured.
3. Choose a signature provider.
4. Check the **Restrict users from changing the signature provider** checkbox and click **OK**.

   If you choose DocuSign as the signature provider, you can choose the DocuSign signature types on the **Create Signature Task** page. You can also choose the option to use the same signature type in all the rounds of the signature task.

Configuring a Template to Restrict Changing the DocuSign Signature Types

This topic explains how template creators can configure a template to prevent other users from changing the DocuSign signature type.

Prerequisites

- The feature **SC-9402: Implement OAUTH authentication between Ariba and DocuSign environments** must be enabled and you must have your site administrator grant access to the OAuth authentication in the SAP Ariba Administrator page. See How to grant admin-user consent for OAuth in SAP Ariba Contracts.

- You must enable DocuSign for electronic signatures on your site and also specify the administrator's DocuSign account ID and email ID in SAP Ariba Contracts. If you do not know the DocuSign account ID, check with DocuSign.

> ⓘ Note
>
> Your organization must have a single administrator account with DocuSign. The account ID will be the ID for the administrator account with DocuSign. For more information, see Enabling Electronic Signatures in Contracts in Contract Administration Guide.

- If you have a standards-based subscription (SBS) with DocuSign and want to use Advanced Signature types, you must enable the `Application.ACM.Signature.DocuSignREST.SBSEnabled` parameter on the **Manage** > **Administration** > **Customization Manager** > **Parameters** page. You can also enable the parameter on the **Manage** > **Administration** > **Project Manager** > **Signature Provider** page of the SAP Ariba Contracts solution. If SBS is enabled, then the signature task must have at least one default signature type.

> ⓘ Note
>
> If you enable the `Application.ACM.Signature.DocuSignREST.SBSEnabled` parameter without having the SBS subscription, then the signature task will fail.

- You must also configure the following parameters in the **Manage** > **Administration** > **Customization Manager** > **Parameters** page :

Parameter	Value
`Application.ACM.Signature.DocuSignREST.Enabled`	Yes
`Application.ACM.Signature.DocuSignREST.OAuth.Enabled`	Yes

Context

The template creator can choose the DocuSign signature types in a contract workspace template, restrict users from changing them in the contract workspace, and restrict users to use the same signature type in all the rounds of the signature task.

Procedure

1. In the contract workspace template, navigate to the **Documents** tab and select a document.
2. Click the document for which you want to create a signature task and then navigate to **Create New Task** > **Signature**.

The electronic signature provider selection window displays options that have been configured for your site. The selection window appears only if more than one signature provider (including Paper signature) is configured.

3. Choose DocuSign as the signature provider.
4. Check the **Restrict users from changing the signature provider** checkbox and click **OK**.

   The **Create Signature Task** page opens.
5. Enter a **Title** and **Description** for the task.
6. In the **Select Signature Type** dropdown, click **Search more**.

   A window opens with the signature types configured with DocuSign for that user account.
7. Select the signature types that you want to use and click **OK**.

   > Note
   >
   > - If you do not see any signature types, contact the administrator to grant consent.
   > - The signature types you select are effective only if you add a signer. Else, DocuSign assigns the default signature type for the account.
8. Check the **Use the same signature type in all the rounds** checkbox.
9. Add a signer and other details to the task, and publish the template.

Results

When a user creates a new contract workspace using this template, in the existing signature task the signature provider details will be read-only and the user can select the signature type only from the signature types pre-selected in the template. If the template creator had selected multiple signature types in the template, the user must edit the signature task to select one of the signature types because one signature task can be associated with only one signature type. On submitting the signature task, the user will be redirected to the **Edit Recipients** view in DocuSign.

Configuring a Template to Restrict Creating an Ad Hoc Signature Task

This topic explains how a template creator can configure the contract workspace template to restrict users from creating an ad hoc signature task in the contract workspace.

Procedure

1. Create or edit a contract template.
2. On the **Overview** tab of the contract template, click **Actions** .
3. Choose **Full View**.

4. On the **Advanced Options** tab, check the **Do not allow the creation of an ad hoc eSignature task** checkbox.
5. Add other required details to the template and publish it.

Use of OAuth Authentication Method for Adobe Sign

REST-based integration of SAP Ariba Contracts with Adobe Sign uses the OAuth 2.0 authentication method to send contracts to Adobe Sign for electronic signatures. The OAuth authentication method allows you to access the Adobe Sign application with unique access tokens that are dynamically generated for each Adobe Sign user.

To use the OAuth authentication method, you must enable the `Application.ACM.Signature.AdobeSignREST.Enabled` parameter in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of SAP Ariba Contracts. For more information about the parameter, see Integrate SAP Ariba Contracts with Adobe Sign by using REST APIs. Your site administrator must grant consent for OAuth in SAP Ariba Contracts. For more information, see Granting Admin-User Consent for OAuth Between SAP Ariba Contracts and Adobe Sign.

Granting admin-user consent to OAuth in SAP Ariba Contracts is a one-time activity. After your site administrator grants consent to OAuth, you can send documents from SAP Ariba Contracts to Adobe Sign for eSignatures.

Prerequisites

- You must configure Adobe Sign for eSignatures in your site. For more information, see Contract Administration Guide.
- To use REST APIs for the integration, user accounts with the **Group Admin** permission for a group must grant consent to the group from the SAP Ariba Administrator page of SAP Ariba Contracts.

> Note
>
> The REST API-based integration works only for a group-based integration as specified by Adobe Sign.

- To use OAuth authentication method:
  - Enable the `Application.ACM.Signature.AdobeSignREST.Enabled` parameter in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Contracts solution.
  - To send contracts from SAP Ariba Contracts to Adobe Sign for electronic signatures, you must have your site administrator grant access to OAuth authentication in the SAP Ariba Administrator page. See How to grant admin-user consent for OAuth between SAP Ariba Contracts and Adobe Sign in Contract Administration Guide.
- Users who initiate a signature task in SAP Ariba Contracts must always have an active account with Adobe Sign.
- As only one Group ID for Adobe Sign can be configured in SAP Ariba Contracts, all users who prefer to send documents for eSignatures from SAP Ariba Contracts to Adobe Sign must belong to the same Group ID configured in the **Signature Providers** page of the SAP Ariba Contracts solution.

Restrictions

- Buyers cannot submit a signature task from SAP Ariba Contracts to Adobe Sign without the admin-user consent for OAuth. If buyers submit a signature task for a document without the admin-user consent for OAuth, the following error is displayed:
`The task has been created but cannot be submitted. Reason: Error in getting the Transient ID for the document :<document name> : Access token provided invalid or has expired To resubmit the task after resolving this issue, view task details and click` **`Submit`**`.`
For more information, see Granting Admin-User Consent for OAuth Between SAP Ariba Contracts and Adobe Sign.
The error is displayed for any type of signature task submitted without the admin user consent; signature tasks such as Submit, New Round, Withdrawal, Update, and so on.

> ⓘ Note
>
> OAuth uses access tokens and refresh tokens for authentication. If OAuth uses a refresh token, and if the refresh token expires, the following message is displayed:
>
> `The task has been created but cannot be submitted. Reason: Error in getting the Transient ID for the document :<document name> : Refresh token is provided invalid or has expired To resubmit the task after resolving this issue, view task details and click` **`Submit`**`.`
>
> Users must grant admin-user consent to Adobe Sign when the above message is displayed.

- Buyers cannot send documents for eSignatures from SAP Ariba Contracts to Adobe Sign if they do not belong to the group registered for Adobe Sign integration in SAP Ariba Contracts.
If a user who does not belong to the group registered for Adobe Sign in SAP Ariba Contracts tries to initiate a signature task, the following error is displayed:
`The task has been created but cannot be submitted. Reason: Error in getting the Transient ID for the document :<document name> : The API caller does not have the permission to execute this operation To resubmit the task after resolving this issue, view task details and click` **`Submit`**`.`

> ⓘ Note
>
> As only one Group ID for Adobe Sign can be configured in SAP Ariba Contracts, all users who prefer to send documents for eSignatures from SAP Ariba Contracts to Adobe Sign must belong to the same Group ID configured in the **Signature Providers** page of the SAP Ariba Contracts solution.

- If the integration uses REST APIs and OAuth authentication, the **Automatically Create User** option will not be available to automatically create a Adobe Sign user account when a user sends the document for eSignature to Adobe Sign.

Parent topic: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]

Creating Signature Tasks

Use this procedure to create signature tasks.

Prerequisites

To submit a signature task that uses electronic signatures, you must have a user account with the signature provider that is registered with the same email address configured for you on the SAP Ariba server. If you do not have a user account with the signature provider, contact the administrator for your signature provider account.

Procedure

1. In the contract workspace, navigate to the **Documents** tab and select a document or folder.
2. Publish the document or each document in the folder by clicking **Actions** > **Publish**.

   The status of the document changes from **Draft** to **Published**. Publishing disallows further modifications to the document until the signature task is submitted.

   > Note
   >
   > You can create a Signature task on an unpublished document, however, you cannot start the Signature task until the document is published. In such cases, you can **Withdraw** the task and start a **New Round** or delete the signature task.

   If you are creating a signature task for a folder, all top-level documents in the folder (documents not in subfolders) are converted and concatenated into a single PDF file.

3. Click ▸ **Create New Task** ▸ **Signature** ▸.

   The electronic signature provider selection dialog box appears displaying the options that has been configured for your site. The selection dialog box appears only if more than one signature provider (inclusive of Paper signature) has been configured.
4. Choose a signature provider and click **OK**.

   A **Create Signature Task** page opens.
5. Enter a **Title** and **Description** of the task.
6. Choose **Signers** for the Signature task. Signers can be individuals within the company and/or business contacts.

   If you are using Adobe Sign, specify all signers using the SAP Ariba interface (you cannot add signers at the Adobe Sign website) and you must specify at least one signer.

   If you are using DocuSign and this is not a self-starting task (the option **Start When Dependencies Complete** is not enabled), you can add signers at the DocuSign website instead of specifying signers using the SAP Ariba interface.

   - To select a new signer who is a user in your SAP Ariba Contracts system or to select a project team, click ▸ **Add Signer** ▸ **Other** ▸. Your selection must be a member of the Document Signer global group or a project team with the role Document Signer.
   - To select a signer you have specified for a previous Signature task, click **Add Signer** and click the signer's name.
   - If a supplier is specified in the **Supplier** project field, you can click ▸ **Add Signer** ▸ **From this supplier** ▸ to add a signer who is a user or business contact configured for the supplier.
   - To select a new signer who is not an SAP Ariba user, click **New Email Signer**. A **Create Business Contact** page opens (the signer will be added as a business contact). Specify the signer's name, email address, title and any other additional information. Click **OK**.
   - To remove a signer, select the signer and click **Remove**. You cannot remove signers that are inherited from a template.

   > ⓘ Note
   >
   > By entering a Signer name and/or email address here (in the SAP Ariba user interface), you acknowledge that you have the authority to allow transfer of this personal data to systems operated by SAP Ariba and also to systems operated by the electronic signature provider selected by you and enabled for your account, and you consent to such transfer and related storage. These systems may be located in a country/region other than where you or the Signer are located.
7. Modify the signing order, if needed. Drag and drop the signers to new positions.

   If supplier is specified in the **Supplier** project field and you have configured supplier users or business contacts as signers, you can click **Move Supplier Signers to Top** button to move supplier signers to the top of the signing order.
8. Select the **Signature Type** that you want to use for the task.

   > ⓘ Note
   >
   > If you are using DocuSign, note the following:
   >
   > - If you are creating the signature task in a contract workspace that is using a template with standard-based subscription (SBS) not enabled, the task might not have any default signature types. But, if you

> enable SBS at a later stage, then you will not be able to submit the task without a signature type. You must edit the task to add a signature type.
> - If the signature type you choose is later removed from the list of signature types supported for your account, then the template owner must delete the task and create another task with supported signature type.

9. Specify a **Due Date** for the task.
10. Specify if the task is a milestone.
11. Specify any **Predecessors**. Predecessor tasks must be completed before the current task can start.
12. **Optional**: If you are submitting a signature task using DocuSign, you can choose to override the value of the **Redirect to Edit Recipients View** attribute from **No** to **Yes**, if the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView.Enabled` is enabled in SAP Ariba Contracts. Overriding the attribute value to **Yes** allows the users to be redirected to the **Edit Recipients** view in DocuSign, where users can choose the advanced signature types for the document.

    > ⓘ Note
    >
    > If the `Application.ACM.Signature.DocuSignREST.RedirectToEditRecipientsView` parameter is set to **Yes** in your site, the attribute **Redirect to Edit Recipients View** in the **Create Signature Task** page of the contract workspace is automatically set to **Yes** by default and is non-editable.

    For more information, see Use of Advanced Signature Types in DocuSign [page 361].
13. Enter any comments to be sent to signers in the **Message** box. Attach any documents that are to be linked to the task using the **Additional Attachments** button. These attachments are not sent to the signers.
14. Choose the destination folder where the signed document is saved.
15. Expand the **Advanced Task Details** section to view other options. You can choose to:
    - Lock the document (prohibits any change while it is locked),
    - Receive notification on comment,
    - Specify the order of the task in relation to other tasks and phases and,
    - Set alerts to the task.
16. Expand the **Notifications** section to select notification options, such as the time duration for notification.
17. **Optional:** If you are submitting a signature task using Adobe Sign, enable popups for your browser to allow a window to the Adobe Sign site to open after the next step. If popups are not enabled, you must manually open a browser window to the Adobe site.
18. Click **Submit**.

    If you are using DocuSign, you are transferred to the DocuSign website; if you are using Adobe Sign, a new window opens to the Adobe Sign site.

    > ⓘ Note
    >
    > If popups are not enabled for your browser and you are using Adobe Sign, the window to the Adobe site will not open. Click the **History** tab for the task to view the URL to the Adobe site and manually open a browser window to the Adobe site. To bypass the Adobe sign in page, you might have to clear your browser cache or use a browser type that is different than the one you use to access the SAP Ariba site.

Use the interface for the electronic signature provider (DocuSign or Adobe Sign) to specify where you want signers to place their electronic signatures or initials. You can also configure security options and data fields. For additional information, see the documentation for the electronic signature provider.

Results

After you send the documents for signing from the electronic signature provider website, signers receive email notifications that direct them to the electronic signature provider website. The signers review the document with icons displayed in the locations where the signer is required to sign or initial. A signer can sign the document or decline it. The possible outcomes are as follows:

- All signers sign
  When all signers sign the document(s), the Signature task is complete and the document's status changes to **Signed**. Then the document owner receives an email notification with the following subject line:
  Completed: docName
  SAP Ariba stores a PDF file that contains the signed document which can also be accessed from the **View Tasks** page. When the Signature task is completed, a document with the name the following name is placed in the signed document location specified by the task owner:
  Signed_docName
  The document status will be **Signed**. To view the status, click the **Properties** tab near the bottom of the page. The signed document might not download immediately after the signature task has been completed. The download time varies according to the size of the document and other factors such as the speed of your internet connection.
- A signer rejects (declines to sign)
  If any signer rejects the document, the status of the signature task changes to **Denied**. When signature is denied, you can:
  - Review the comments or document changes requested by the reviewer.
  - Incorporate the changes requested by the signer and upload the document again.
  - Initiate a new round of signature task.

Task overview: Management of Signature Tasks [page 354]

Related Information

Actions Available on the Signature Providers' Websites [page 355]
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Starting a New Round for Signature Tasks

Use this procedure to start a new round for signature tasks.

Context

You might want to initiate a new round of signature task in scenarios such as the following:

- a document is required to be signed periodically
- the signers have changed
- the document has changed
- the signature task is past the due date and is still unsigned

Procedure

1. Create a new version of the document.
   a. Navigate to the **Documents** area. Click the name of the document for the task and choose **View Details**.
   b. On the Overview tab, choose **Actions** > **Version** > **Save as New Version**.
   c. Modify attributes for the document as needed and click **Save**.
2. Navigate to the **Tasks** area. Click the name of the task for which you want to start a new round and choose **View Task Details**.
3. Click the **New Round** button.
4. Modify attributes for the task as needed and click **Submit**.

Task overview: [Management of Signature Tasks [page 354]]

Related Information

[Actions Available on the Signature Providers' Websites [page 355]]
[Signature Task Workflow [page 357]]

[Use of OAuth Authentication Method for DocuSign [page 358]]
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Withdrawing Signature Tasks

Use this procedure to withdraw signature tasks.

Procedure

1. Navigate to the **Tasks** area. Click the name of the task you want to submit and choose **View Task Details**.
2. In the Signature Task page, click **Withdraw** in the right pane.
3. In the Message box, enter a comment, if required.
4. Add attachments.
5. Click **OK**.

Results

The Signature task status is reflected in the **Tasks History** tab. When a task is withdrawn, SAP Ariba notifies the listed signers that the task has been withdrawn.

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Related Information

Actions Available on the Signature Providers' Websites [page 355]

Updating the Status of Signature Tasks

Use this procedure to update the status of signature tasks.

Context

The status of the document is periodically updated based on the signature task refresh interval set by your organization. The default value of refresh interval is 120 minutes and is controlled by the parameter `Application.ACM.Signature.SignatureTaskRefreshInterval`. For more information, see Site Configuration Options for Signature Tasks [page 444].

Procedure

Click the **Refresh Status** link from **Actions** menu of the task.

This action overrides the scheduled task time. The SAP Ariba system sends a request to the electronic signature provider to get the status of the task.

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Related Information

Actions Available on the Signature Providers' Websites [page 355]

Viewing Signature Tasks on the Signature Provider's Website

Use this procedure to view signature tasks on the signature provider's website.

Prerequisites

You must have login information for an account on the signature provider's website.

Procedure

1. Locate the task in the project **Tasks** area.
2. Click on the task name and select **Action** > **View Task Details**.
3. Click the **Task History** tab near the bottom of the page. Locate the current signature round and click the **View** link.
4. A window opens to the signature provider's website.

   For Adobe Sign, login using information for the account associated with the Adobe Sign API key configured for your organization.

   For DocuSign, login using information for the DocuSign Account Administrator account for your organization or the DocuSign account that uses that same email address as the user who submitted the signature task. If you login as an DocuSign Account Administrator, you can view all documents submitted for signing from your organization. If you login as the user who submitted the signature task, you can view all documents submitted by you and by users who have you configured in their DocuSign Sharing settings.

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Editing Signature Tasks

Use this procedure to edit signature tasks.

Context

If you are managing a signature task that uses DocuSign, you can edit the task.

Procedure

1. Locate the task in the project **Tasks** area.
2. Click on the task name and select **Action** > **Edit Task**.
3. Perform the necessary modifications and click **OK** in the Signature Task page.
4. If required, you can start a **New Round** after regenerating and republishing the documents.

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Paper Signature Tasks

The paper signature option allows signature task owners to manually complete a signature task by uploading an image of the signed document. To complete a paper signature task, users can submit a file with an electronic image of a "wet" signature (an image of a signature originally stroked on a paper document, using wet or pen ink)

You can use the Paper Signature option when:

- You initially create a signature task.
- A signature task was created using an electronic signature provider, but the signers do not use the electronic signature provider and instead provide a document signed with wet ink. In this case, the task owner completes an electronic signature task with a paper signature.

Parent topic: Management of Signature Tasks [page 354]

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Completing an Electronic Signature Task with a Paper Signature [page 383]

Creating Paper Signature Tasks

Use this procedure to create paper signature tasks.

Procedure

1. Upload the document to sign in the workspace
2. Publish the document.
3. Select **Tasks** > **Action** > **Signature**.
4. Select **Paper Signature** option from the Signature Provider selection dialog box.

   > Note
   >
   > The selection dialog window displays the option only if multiple signature providers are enabled.

5. Enter or edit the **Title** and **Description** for the paper signature task in the **Create Signature Task** page.
6. Indicate the **Due Date**.
7. Indicate if the Due date is a **milestone**.
8. Enter a message in the **Message** box; this can be information for further reference.
9. Choose **Predecessors**, if any.

   Predecessor tasks and phases help you enforce business rules about the order in which tasks and phases must be completed.
10. Choose the folder to save this document.
11. Fill in **Advanced Task Details** and **Notifications** if required.

12. Click **Submit**.

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Completing Paper Signature Tasks

Use this procedure to complete paper signature tasks.

Context

Use this procedure to complete a task created as a paper signature task. For information about completing a task created as an electronic signature task using a paper signature, see Completing an Electronic Signature Task with a Paper Signature [page 383].

Procedure

1. Locate the task in the project **Tasks** area.
2. Click on the task name and select **Action** > **Edit Task**.

3. Fill in the required details in the Signature Task page.
4. Navigate to the **Upload Signed File** and select the signed document (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
5. Click **OK.**
6. Click on the task name and choose **Action** > **Mark Complete** .
7. Click **OK.**

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Completing Electronic Signature Tasks with Wet Ink (Paper) Signatures

Use this procedure to complete electronic signature tasks with wet ink (paper) signatures.

Context

Use this procedure when a signature task is created using an electronic signature service but the signers sign the document using wet ink. After the task owner receives the signed document, the owner can perform the following steps to mark the task as completed.

Procedure

1. Create an electronic image file (such as a GIF or PNG file) of the document with the paper signature.
2. Select a signature task created using an electronic signature provider.
3. Go to **View Task Details.**
4. Click **New Round**.
5. Select **Manual** > **Signature.**
6. Enter the necessary text and **Submit.**
7. Go to **Edit** > **Task.**
8. Upload the image file with the signed document. Click **OK.**
9. Go to **Task** > **Action** > **Mark Complete**.

> Note
>
> The size limit for the electronic image file must be 100 megabytes (MB) or less. For more information, see Support-Enabled Site Configuration Parameters for Supplier Management.

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Management of Notification Tasks

This topic describes how to manage notification tasks. For general information about all task types and task options, see About Tasks [page 300].

The notification task workflow includes the following steps:

1. The project owner or project team member creates a new notification task in a project. Alternatively, the project owner or project team member edits a notification task that the project inherited from its template. The project owner or project team member clicks **Start Schedule** for the notification task. A notification task can also be inherited from the project's template with the auto-start schedule option so that its schedule automatically starts when all predecessors have been completed, and the **Recipients** and **Due Date** fields have values specified.
2. If the First Send Date is today, SAP Ariba immediately sends the notification messages. If the First Send Date is a future date, SAP Ariba sends it on the First Send Date.
3. If the **Requires Manual Completion** option is not set, SAP Ariba marks the task complete after all messages are sent (or sent for the round, if this is a task with a recurring send schedule).
   If the **Requires Manual Completion** option is set, SAP Ariba adds the task to the recipients' task lists.

Unique Notification Task Features [page 385]

Creating Notification Tasks [page 389]

Editing and Submiting Notification Tasks Inherited from Templates [page 390]

Unique Notification Task Features

The main differences between notification tasks and other project tasks are as follows:

- Notification tasks can continue to occur regardless of a project's state. For example, they can continue to occur after a sourcing project ends. In SAP Ariba Contracts workspaces, notification tasks can continue after a workspace is published, closed, or expired. Notification tasks can also occur when a contract workspace is on hold. If a contract workspace is published, users can complete and create notification tasks without amending the contract workspace.
- Notification tasks are always optional. Phases and projects can be completed whether or not notification tasks are complete. Although all notification tasks are optional, you must specify a due date for each one. SAP Ariba uses the due date to determine the send date and to determine if the task is overdue. For more information, see Notification Task Schedules [page 386].
- Notification tasks are only related to phases as follows:
  - A notification task can be included in a phase and the due date for a notification task can be based on the start of the phase (you can set the task due date to be n days after the phase starts).
  - A notification task can be included in a recurring phase and SAP Ariba will create another instance of the notification task when it creates another occurrence of the phase.

> ⓘ Note
>
> If you create a notification task with recurring rounds within a recurring phase, SAP Ariba creates multiple instances of the task for each instance of the phase. SAP Ariba recommends that you do not configure a notification task with recurring rounds in a recurring phase.

Other than notification task instances created for recurring rounds in a recurring phase, there are no other relationships between a notification task and the phase containing it. For example:

- Starting a notification task in a phase does not start the phase.
- Users can start a notification task in a phase even if the phase has not been started.
- A phase can complete even if a notification task has not completed.
- Notification tasks do not affect the autocompletion of a phase. If autocompletion of a phase is enabled (the parameter `Application.ACM.PhaseAutoComplete` was not disabled), the phase is marked complete if all required tasks other than notification tasks are complete (the phase is marked complete regardless of the status of the notification tasks in the phase). Site configuration options are set for you by SAP Ariba. For more information about this option, see Application.ACM.PhaseAutoComplete [page 445].

Parent topic: Management of Notification Tasks [page 385]

Related Information

Creating Notification Tasks [page 389]
Editing and Submiting Notification Tasks Inherited from Templates [page 390]

Notification Task Schedules

When you create a notification task, you specify the following items that determine the notification task schedule:

- **Due Date**
- **Notification Days**
- **Notification Frequency**
- **Final Send Date** (for recurring notification frequencies)
- **Requires Manual Completion**

Notification Task Due Date

SAP Ariba uses the due date as a base to determine when it sends the notifications (the send date) and to determine if the task is overdue. The due date can be based on:

- a fixed date
- the start of the parent phase
- a project date field, such as the publication or expiration date

Notification Days

SAP Ariba uses the notification days with the due date to determine the send date. The notification days includes the offset type (after or before the due date). The send date is the due date plus (after) or minus (before) the specified number of notification days. For example, if the Due Date is April 15th 2011 and the Notification Days is 10 days before, the send date is April 5th 2011.

Notification Frequency

You can schedule a notification task to send the notification:

- **Only once**
- **Every n day(s)**
- **Every n week(s)**
- **Every n month(s)**
- **Follow Selected Due Date Field** (only available if you choose **Select a Date Field** for the due date)

If you specify **Every n day(s)**, **week(s)**, or **month(s)**, SAP Ariba creates multiple, recurring rounds at the specified intervals based on the value of the due date when the first scheduled send date occurs. If the due date is based on a project date field, the scheduled send dates remain the same even if the project date field value changes.

Follow Selected Due Date Field

The **Follow Selected Due Date Field** frequency option for notification tasks is intended to create one notification round based on the project date field specified in the **Due Date** field. SAP Ariba schedules one round based on the due date and the **Notification Days** value. If the project date field value changes, SAP Ariba recalculates the send date and uses the new send date as follows:

- If the original due date has not already occurred and SAP Ariba has not sent the notification, SAP Ariba just uses the new send date (it does not create an additional notification round).
- If the original due date has not already occurred but the original send date has occurred (SAP Ariba has already sent the notification), SAP Ariba creates an additional notification round. If the original round has not been completed and becomes overdue, SAP Ariba sends reminder notifications.
- If the original send date has already occurred and SAP Ariba has already sent the notification and the new send date is later than the original send date, SAP Ariba creates an additional notification round for the new send date.
- If the original due date has already occurred and SAP Ariba has already sent the notification and the new send date is earlier than the original send date, SAP Ariba does not create an additional notification round.

Notification Task Final Send Date

If you specify **Every n days**, **weeks**, or **months** for a notification task frequency, you can also specify a final send date (the last date to send notifications). The final send date can be a fixed date or based on a selected project date field.

SAP Ariba recommends that you specify a value for **Final Send Date**. Notification tasks send notifications regardless of the project or workspace status. If you do not specify a final send date, SAP Ariba will continue to send notifications until you specify a final send date or change the notification frequency to **Only once**.

Requires Manual Completion Option and Overdue Tasks

You can use the **Requires Manual Completion** option to require a notification task recipient or the task owner to manually mark a notification task complete. If the **Requires Manual Completion** option is enabled and all task recipients are Business Contacts, the task owner must manually mark the task complete. By default, the **Requires Manual Completion** option is not set and SAP Ariba automatically marks a notification task complete (or marks the round complete if it is a recurring notification task).

If a notification task is not completed by its due date, SAP Ariba marks it overdue. By default, SAP Ariba starts sending overdue notifications 7 days after a notification task is overdue and continues to send overdue notifications every 2 days until the task is completed.

If you choose the **Requires Manual Completion** option, you must specify a value for **Notification Days** that is before the due date. (SAP Ariba does not allow you to specify a value for **Notification Days** that is after the due date because doing so would cause a task to be overdue before the notification was sent.)

Missed Rounds in Notification Tasks

When a notification task is overdue, SAP Ariba retains information about any missed rounds. When a round for an overdue task is marked complete, SAP Ariba schedules any missed rounds in sequence until each round is complete. If the **Requires Manual Completion** option is set, the task recipient or task owner must mark each missed round complete.

For example, a project has a notification task with the following values:

- Initial send date: January 1, 2011
- Due Date: January 15, 2011
- Notification Frequency: Once every month.
- Final Send Date: January 1, 2012.

The recipient does not complete the initial round for this task until February 24th. On January 22nd, SAP Ariba began sending overdue reminders to the recipients and the task owner (because the initial round was due on January 15th and `Application.ACM.OverdueNotifyTaskReminderBegin` is set to seven days). When the recipient completes the first round, SAP Ariba sends the notification for the second round (the round for February 1) and marks the round overdue (because it was due on February 15th). SAP Ariba also sends an overdue reminder for the February task.

Related Information

[Creating a Notification Task [page 389]](#)
[Editing and Submitting a Notification Task Inherited from a Template [page 390]](#)

Creating Notification Tasks

Use this procedure to create notification tasks.

Procedure

1. On the **Tasks** tab, choose **Actions** > **Create Notification Task**.

   You can also create a notification task for a document or folder by navigating to the **Documents** tab, clicking a document name, and choosing **Create New Task** > **Notification**.

   To create a notification task for the entire project, navigate to the Overview area and choose **Actions** > **View Details**. From the Tasks area, choose **Actions** > **Create New Task** > **Notification**.

   SAP Ariba opens a **Create Task** page.
2. Enter a title and description.
3. If recipients were not specified in the template, select recipients. Click the arrow for the **Recipients** field to display possible choices. Choose the recipients. A recipient can be an internal user or an external user already configured in the system.

   To add an email address for an external recipient not already configured in the system, click **New Email Recipient**.

   If you select a group as a recipient and choose **Requires Manual Completion**, the task can be marked complete by one user in the group or the task owner. The task remains in each user's My Tasks list until a user in the group or the task owner completes the task.
4. Specify a due date for the task. If the task is not completed before its due date, the task becomes overdue and SAP Ariba sends reminder notifications.

   The **Selected Date Field** option enables you to specify a due date from a project or parent phase. To use this option, click the radio button, then click **Select Date Field**. SAP Ariba opens a Choose a Date Field pane with folders that contain the field values. Click the expand arrows (▷) to see the possible values.

   Click **Select** to select a field, then click **Done**. For more information, see Notification Task Schedules [page 386].
5. Specify the notification days for the task. SAP Ariba calculates the first send date by adding or subtracting the specified number of days from the due date.
6. Specify the notification frequency. Valid values are:

   - **Only once**
   - **Every n day(s)**

- **Every n week(s)**
- **Every n month(s)**
- **Follow Selected Due Date Field** (only available if you choose **Select a Date Field** for the due date)
  For more information, see Notification Frequency [page 387].

7. If the Notification Frequency is more than once, you can also specify a **Final Send Date**.

   SAP Ariba recommends that you specify a Final Send Date. Notification tasks send notifications regardless of the project or workspace status. If you do not specify a Final Send Date, SAP Ariba will continue to send notifications until you specify a Final Send Date or change the frequency to once.
8. Choose **Requires Manual Completion** if you want to require the task owner or a recipient to manually mark the task complete for each round. If the task is not completed before its due date, the task becomes overdue and SAP Ariba sends reminder notifications. For more information, see Requires Manual Completion Option and Overdue Tasks [page 388].
9. Specify any predecessors. These tasks and phases must be completed before the current task can start.
10. Click **Start Schedule**. This submits the task.

Task overview: Management of Notification Tasks [page 385]

Related Information

Unique Notification Task Features [page 385]
Editing and Submiting Notification Tasks Inherited from Templates [page 390]

Editing and Submiting Notification Tasks Inherited from Templates

Use this procedure to edit and submit notification tasks inherited from templates.

Context

A project can contain a notification task inherited from a template. If the template author selected the **Should Auto-Start Schedule** option, SAP Ariba automatically starts (schedules) the task when all predecessor tasks and phases are completed in the project. If this option was not selected, you must submit the task to schedule it.

Procedure

1. Navigate to the **Tasks** area. Click on the task name and choose **Action** > **Edit Task**.

   SAP Ariba opens a **Notification Task** page.

2. Edit or complete the field values as described in Creating a Notification Task [page 389].
3. Click **OK**. This submits the task.

Task overview: Management of Notification Tasks [page 385]

Related Information

Unique Notification Task Features [page 385]
Creating Notification Tasks [page 389]

Configuring Advanced Task Details

Context

When you are submitting or creating a document task, you can configure the following advanced options:

- **Lock Document**
  Locks the document while the task is active (submitted but not complete). The lock prevents users other than you from creating a new version of the document in the system. This in an advisory lock only; users with access to the document can navigate to the Documents area and click on the lock icon for the document and unlock the document.
- **Notification on comment**
  Sends notifications to all task participants when comments are added to the task. Comments can be made on any type of task, at any time, by any user able to view the task.
- **Reviewer Can Edit**
  Enables internal reviewers to directly edit the documents in the system. This option is only visible for review tasks. For more information about this field, see Reviewers with Edit Access [page 321].
- **Display after**
  Specifies the location of the task as displayed in the task list. This affects only where the task is displayed in the list and does not assign predecessors. However, if a task has predecessors assigned, SAP Ariba does not allow you to display a task before its predecessors. For information about assigning predecessors, see Using Predecessor Tasks and Phases [page 404].
- **Alert**
  Displays an icon to the right of the task indicating that the task requires special attention.

Procedure

1. Navigate to the bottom of a page for creating or editing a task and expand **Advanced Task Details**.
2. Click **Yes** next to the **Lock Document**, **Notifications on comment**, or **Reviewer Can Edit** options to enable these options.

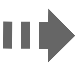
3. To use the **Display after** option, click **select** to open a chooser that lists the tasks and phases in the project. The current task will be displayed after the task or phase you select.
4. To use the **Alert** option, select a color for the alert icon from the pull-down menu.

Use of Phases to Organize Tasks

A phase is an organizational structure for tasks.

It is not necessary to use phases in a project, but they are helpful in organizing tasks and activities. You can configure recurring phases, which are phases that are automatically re-created at regular intervals. Recurring phases are useful for tasks that re-occur at regular intervals, such as reviews that occur once every month.

Phases are indicated in the **Tasks** table by slashed arrow icons. For example, the following arrow icon indicates the current (active) phase:



Phases can either come from a template, or you can create them in a project. Like any object, you can edit the properties of a phase by clicking **View Details** and **Edit**.

By default, a phase automatically starts when one of its tasks is marked Started or Complete and automatically completes when all of its required tasks are complete. (These behaviors are controlled by the parameters `Application.ACM.PhaseAutoStart` and `Application.ACM.PhaseAutoComplete`, as described in Site Configuration Options for Phases [page 445].)

If a phase is automatically started by SAP Ariba when one of its tasks is started, it remains started even if tasks are reset to the Not Started state.

Recurring Phases

You use recurring phases for repeating processes. For example, if you have a monthly review that involves three tasks for each review, you can create a recurring phase that contains those tasks. SAP Ariba creates new instances of a recurring phase for you at regular intervals. SAP Ariba continues to create phases until you stop the recurrence or close the project, regardless of whether the previous phases are completed. If you have a recurring phase in an SAP Ariba Contracts workspace, phase creation stops when the contract expires.

The interval between recurring phases is specified by the recurrence pattern. A recurrence pattern specifies the day of the month each phase starts and the frequency of the phases, in months.

Recurring phases are controlled by a master recurrence, which is indicated by a rotating arrow icon:

You must start or activate the recurrence for the first time to trigger the recurring phase sequence, as described in Creating and Starting Recurring Phases [page 395]. When you start the recurrence, the master recurrence is replaced by a phase, which contains all of the tasks the master recurrence contained.

> **Note**
>
> Do not specify recurring phases as predecessors.

Parent topic: Use of Phases to Organize Tasks [page 392]

Related Information

Predecessor Phases [page 395]
Creating Phases [page 396]
Starting Phase Recurrences [page 397]
Displaying or Hiding Master Recurring Phases [page 398]
Stopping or Restarting Recurring Phases [page 399]
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Changing the Time Interval for Recurring Phases [page 401]
Creating a New Occurrence in a Recurring Phase [page 402]
Configuring Document Version Handling in Recurring Phases [page 403]

Recurring Phase Schedules

When you start a recurrence, the current month and the day of the month configured for the recurrence pattern become the initial date used when calculating the recurring schedule. The date the first recurrence phase actually starts is the next occurrence of the day of the month in the recurrence pattern. For example, if:

- the recurrence pattern is `Day 1 of every 1 month`
- you start recurrences on February 14th, 2012

Then:

- the initial date used to calculate the recurring schedule is February 1, 2012

- the first recurrence phase starts on March 1, 2012

If the day in the recurrence pattern does not occur in every month (such as the 31st), SAP Ariba schedules the phase for the nearest day prior to the selected day (such as the 30th or 28th).

After a phase starts, the next instance of the phase is created by a scheduled task that runs approximately every 12 hours (the actual interval can vary according to the system load). In the previous example, the first phase is started on March 1, 2012 and the next phase will be created within the next 12 hours (approximately). The next phase is created ahead of its scheduled start time so that project team members can begin preparing for it, and will begin automatically unless you stop the recurrence.

You cannot modify the start date of a phase to be earlier than one interval before the initial date of a recurring schedule. In the previous example, you could not modify the starting date to be earlier than January 1, 2012.

Recurring Phase Names

SAP Ariba generates a new name for each instance of a recurring phase using the following format:

`phase_name (Mmm year)`

where `Mmm` is a three-character abbreviation for the month and `year` is the year. For example, `Quarterly Review (Apr 2012)`.

If you modify the time interval of a master recurrence, instances that you create after the schedule change will follow the new schedule, but instances that were created but not started before the schedule change will follow the previous schedule.

Documents in Recurring Phases

If a task in a recurring phase refers to a document, such as a review or approval task, SAP Ariba creates a folder in the Documents area for each instance of the phase with the name of the instance of the phase. For example, `Quarterly Review (Apr 2012)`.

By default, SAP Ariba creates a new copy of a document for a task in a recurring phase (with version number `vn`) and adds it to the appropriate folder.

If you are configuring a phase in a project template, you can configure the phase so that each occurrence creates a new version of each document (and there will be only one copy of each document). Only the document folder for the most recent instance of the phase will contain the document. (SAP Ariba removes the document from document folders for older instances of the phase as it creates new versions of the phase.) To configure this option, see Configuring Document Version Handling in Recurring Phases [page 403].

On the **Tasks** tab, the Document column displays the documents associated with tasks in a recurring phase.

The state of the document in each occurrence is determined by the state of the document before you begin the recurrence. For example, if the document is in the state Not Edited when you start the recurrence, all subsequent copies made of that document for recurring phases will also be in the state Not Edited.

Creating and Starting Recurring Phases

To use recurring phases, you create a master recurring phase (see Creating a Phase [page 396]) and start the recurrences (see Starting Phase Recurrences [page 397]).

Predecessor Phases

You can use predecessor tasks and phases to enforce business rules about what phases and tasks team members must complete before they move on to the next phase or task. You can nest tasks in phases. Phases can have and be predecessors for phases or tasks.

Choose the predecessor from the available tasks and phases. You can specify more than one predecessor.

You can specify predecessor phases in templates and projects. If you specify the predecessor phase in a project, team members cannot change the predecessor relationship, but can add new predecessors to it.

For more information about predecessor phases, see Enforcing Task Order with Predecessor Tasks and Phases [page 404].

Parent topic: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Creating Phases [page 396]
Starting Phase Recurrences [page 397]
Displaying or Hiding Master Recurring Phases [page 398]
Stopping or Restarting Recurring Phases [page 399]
Editing Phases and Setting Phase Options [page 399]
Changing the Time Interval for Recurring Phases [page 401]
Creating a New Occurrence in a Recurring Phase [page 402]
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Configuring Document Version Handling in Recurring Phases [page 403]

Creating Phases

Use this procedure to create phases.

Procedure

1. On the **Tasks** tab, click **Actions** and choose **Create** > **Phase**.
2. Enter a name for the recurring phase.
3. For **Recurring Schedule**, click the **Yes** radio button.
4. Enter the day of the month and frequency for the **Recurrence Pattern** fields.
5. Click **Done**.
6. On the **Tasks** tab of the project, click **Actions** > **Create** > **Phase**.

   SAP Ariba opens a **Create Phase** page.
7. Enter a title for the phase.
8. Provide a description for this new phase. You can view this description by clicking the phase in the **Tasks** tab of a project and choosing **View Details**.
9. Use **Subscribe For** to choose associated keywords. When this phase is active, SAP Ariba will display knowledge projects that are published with the specified keywords in the **Related Knowledge** portlet.
10. Use **Display After** to choose the position of this phase in the list of phases and tasks. To change the ordering of phases and tasks, you can drag and drop them on the **Tasks** tab.
11. If this phase (and the tasks in it) are going to occur in the project more than once, set **Recurring Schedule** to **Yes** and set the values for the **Recurrence Pattern** fields (the **Recurrence Pattern** fields are not shown if **Recurring Schedule** is **No**). See Recurring Phases [page 392] for more information about recurring phases.
12. Specify any predecessors. These phases or tasks must be completed before the current task can start. See Predecessor Phases [page 395] for details.
13. Click **OK**.

Next Steps

If you created a recurring phase, use the procedure described in Starting Phase Recurrences [page 397] when you are ready to start the phase recurrences.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]

[Starting Phase Recurrences [page 397]]
[Displaying or Hiding Master Recurring Phases [page 398]]
[Stopping or Restarting Recurring Phases [page 399]]
[Editing Phases and Setting Phase Options [page 399]]
[Changing the Time Interval for Recurring Phases [page 401]]
[Creating a New Occurrence in a Recurring Phase [page 402]]
[Configuring Document Version Handling in Recurring Phases [page 403]]

Starting Phase Recurrences

Use this procedure to start phase recurrences.

Context

Because the application copies all tasks for each occurrence of the phase from the master recurrence, SAP Ariba recommends that you publish all documents associated with the master recurrence before starting the recurrence so that they can be used in the phases.

Procedure

1. Click the name of a master recurring phase. See Creating a Phase [page 396] for information on creating master recurring phases.
2. Choose **Action** › **Start Recurrence**.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]
Creating Phases [page 396]
Displaying or Hiding Master Recurring Phases [page 398]
Stopping or Restarting Recurring Phases [page 399]
Editing Phases and Setting Phase Options [page 399]
Changing the Time Interval for Recurring Phases [page 401]
Creating a New Occurrence in a Recurring Phase [page 402]
Configuring Document Version Handling in Recurring Phases [page 403]

Displaying or Hiding Master Recurring Phases

Use this procedure to display or hide master recurring phases.

Context

By default, after the recurring phase begins, the occurrences display but the master recurrence is hidden. You can show the master recurrence in order to view its details or edit it, or hide it when you do not need to work with it to keep the **Tasks** tab uncluttered.

Procedure

1. Click the name of any instance of a recurring phase.
2. Choose **Action** > **Show Recurrence** or **Action** > **Hide Recurrence**.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]
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Starting Phase Recurrences [page 397]
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Creating a New Occurrence in a Recurring Phase [page 402]
Configuring Document Version Handling in Recurring Phases [page 403]

Stopping or Restarting Recurring Phases

Use this procedure to stop or restart recurring phases.

Procedure

1. Display the master recurrence as described in Displaying or Hiding the Master Recurring Phase [page 398].
2. Click the master recurrence name (the phase with the rotating arrow icon) and choose **Action** > **Stop Recurrence** or **Action** > **Restart Recurrence.**

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]
Creating Phases [page 396]
Starting Phase Recurrences [page 397]
Displaying or Hiding Master Recurring Phases [page 398]
Editing Phases and Setting Phase Options [page 399]
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Configuring Document Version Handling in Recurring Phases [page 403]

Editing Phases and Setting Phase Options

Use this procedure to edit phases and set phase options.

Procedure

Click the phase title and choose **Edit Phase**.

The following table lists the options available for phases:

This Phase Setting...	Controls...
Title	The display title of the phase.

This Phase Setting...	Controls...
Description	The description of the phase. The description can be helpful in explaining when recurring phases should be started, or when a particular phase is necessary.
Subscribe For	Which keywords are seen as important in this phase. You can use phases to present keywords for knowledge matching by entering relevant keywords for the phase in the Subscribe For field. For example, if a phase deals with customer relationship, you could add the keyword Supplier. Then, all documents in knowledge projects that are associated with Supplier automatically appear in the Related Knowledge portlet on left side of the project page when this phase is active. See Creation and Management of Knowledge Projects [page 85] for details on knowledge matching.
Display After	Where, visually, the phases are displayed. This setting does not control the due date of the phase, only the vertical order in which the phase appears.
Planned Start Date	When the phase should begin. You can choose a specific date for a phase to begin or set a date offset, so that if previous tasks or phases run longer than scheduled, you do not need to change the date manually. A scheduled task runs approximately once a day that checks phases with a planned start date. If a project with a planned start date has not been started, project owners will receive one notification, seven days before the planned start date.
Recurring Schedule	Whether or not this phase is recurring. If this is set to **Yes**, additional recurrence fields appear for recurrence parameters. For more information on recurring phases, see Recurring Phases [page 392].
Alert	The alert color for the phase. By default, outside actions do not trigger this value and you must set it manually. You can use alerts as visual cues for phases that require additional attention. If set, the alert appears as a colored box on the far right of the **Tasks** tab for the phase.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
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Configuring Document Version Handling in Recurring Phases [page 403]

Changing the Time Interval for Recurring Phases

Use this procedure to change the time interval for recurring phases.

Context

The occurrences of a recurring phase inherit all of the properties of the master recurrence, such as the recurrence pattern. Modifying the master recurrence modifies all of the occurrences it creates.

Procedure

1. Display the master recurrence as described in Displaying or Hiding the Master Recurring Phase [page 398].
2. Click the master recurrence name (the phase with the rotating arrow icon) and choose **Action** > **View Phase Details**.
3. Click **Action** and choose **Phase** > **Edit**.
4. Modify the recurrence time.
5. Click **OK**.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
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Creating a New Occurrence in a Recurring Phase

Use this procedure to create a new occurrence in a recurring phase.

Context

You can only create a new occurrence (instance of a phase) in a recurring phase that has been started.

Procedure

1. Display the master recurrence as described in Displaying or Hiding the Master Recurring Phase [page 398].
2. Click the master recurrence name and choose **Action** > **View Phase Details**.
3. Click **Action** and choose **Create New Occurrence**.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]
Creating Phases [page 396]
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Configuring Document Version Handling in Recurring Phases [page 403]

Configuring Document Version Handling in Recurring Phases

Use this procedure to configure document version handling in recurring phases.

Procedure

1. In a project template, find or create a task for the document; add the task to a recurring phase if it is not already in a recurring phase. (You must be working on a document in a project template that is associated with a task in a recurring phase to configure the document recurrence option.)
2. Under the **Documents** tab, locate the document. Click the document name and select **Action** > **Edit Attributes**.
3. Navigate to the **Recurrence** area at the bottom of the document page. Select one of the following options:
   - **A new Copy of this document for each occurrence**
     A new copy of the document is created for each recurrence; this is the default)
   - **A new Version of this document is created for each occurrence**
     A new version of the document is created for each recurrence, but only one copy of the document is exists, which is stored in the document folder for the newest instance of the phase) To view the document, users navigate to the document folder for the most recent instance of the phase. (SAP Ariba removes the document from document folders for older instances of the phase as it creates new versions of the phase.)
4. Click **Save**.

Task overview: Use of Phases to Organize Tasks [page 392]

Related Information

Recurring Phases [page 392]
Predecessor Phases [page 395]
Creating Phases [page 396]
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Creating a New Occurrence in a Recurring Phase [page 402]

Enforcing Task Order with Predecessor Tasks and Phases

Use this procedure to enforce task order with predecessor tasks and phases.

Context

Predecessor tasks and phases help you enforce business rules about the order in which tasks and phases must be completed. Users cannot start a task or phase until all of its predecessors are complete. A task or phase can have predecessors and also be a predecessor for other tasks or phases.

Predecessor tasks and phases have the following characteristics:

- If you specify predecessors in a template, team members working on projects created from the template cannot remove predecessor relationships in the project, but can add new predecessors to it.
- If you delete a task, or if a condition deletes it, the application removes it as a predecessor. When you cancel an optional task that is the predecessor for another task, you can start the successor task or phase if there are no other dependencies.
- If a predecessor task is completed and a user restarts (creates a new round of) the task, SAP Ariba creates new rounds of any successor tasks that have already started or are complete.
- You cannot set a task or phase as its own predecessor, or create a cyclic dependency. For example, if you set Task A as a predecessor for Task B, you cannot then set Task B as a predecessor for Task A. Also, you cannot set predecessor tasks in combination with recurring tasks.
- A nested phase can be a predecessor to other phases or tasks if the target (successor) phase or task is contained within the predecessor task, either directly or nested below a phase in the predecessor task.
- You can select predecessors when you create a task or phase, or when you edit a task or phase that has not started.
- Tasks in an ad hoc event in a project are not dependent on their predecessor tasks and can be initiated even before the predecessor tasks are completed.

Procedure

1. Open the task or phase for editing. Click the **Predecessor** field in a create or edit screen for a task or phase (the value will be **select** if there are no existing predecessors).

   SAP Ariba opens a chooser with the available tasks and phases.
2. Select the appropriate predecessor or predecessors and click **OK**.

Using Self-Starting Tasks and Phases

This procedure describes how to use self-starting tasks and phases.

Context

Self-starting tasks and phases automatically start when all predecessors are completed; users do not have to manually start them. If configured correctly, all tasks in a project can be completed without requiring project owners to sign in and start tasks or phases.

Self-starting signature tasks are automatically submitted to the electronic signature provider. The user is not directed to the electronic signature provider's web site, so all signers must be specified in the SAP Ariba approval flow.

If a self-starting task is a document task, the document must be in an appropriate state to be automatically started. For signature tasks, the document must be in the **Published** state; for all other document tasks, the document must be in the **Draft** or **Published** state.

If all predecessors for a self-starting document task are completed but the document is not in an appropriate state, the task does not automatically start and the task owner receives an email notification. The task owner can change the document state, view the task details, and re-submit the task.

When a project is created with documents inherited from a project template, the documents are created with the following states, which might prevent tasks from starting:

- **Not Edited** if the document is not an assembled contract document (Main Agreement or Contract Addendum).
- **Not Generated** if the document is an assembled contract documents but the user who created the project did not have Desktop File Sync (DFS) enabled.
- **Draft** if the document is an assembled contract documents and the user who created the project had DFS enabled.

> → Tip
>
> If you want to create a self-starting task for a document inherited from a project template, SAP Ariba recommends that you create a to do task as a predecessor that requires a user to publish or generate the document.

SAP Ariba checks if self-starting tasks need to be automatically started once and only when the predecessor tasks are completed. If you create a self-starting task but all predecessor tasks are already completed, the task will not be automatically started.

If a self-starting task cannot be started even though all its predecessors were completed, the task is shown with a warning icon (⚠) and a log entry is written below the project **History** tab.

Procedure

1. Open the task or phase for editing. Add predecessor tasks or phases [page 404].
2. Check **Start When Dependencies Complete**.

Canceling Optional Tasks

Use this procedure to cancel optional tasks.

Prerequisites

To cancel a task, you must be the project owner or task owner of an optional task and the task must not be started (the status is Not Started).

Procedure

1. Navigate to the **Tasks** tab for the project.
2. Click **Actions** > **Cancel** > **Optional Tasks**. SAP Ariba lists all optional tasks that have not been started.
3. Select the tasks you want to cancel.
4. Click **Mark Cancelled**.

Forcing Complete a Task in a Contract or Sourcing Project

Administrators can use this procedure to force complete tasks to bypass the corresponding workflows.

Prerequisites

You must be a member of the **Customer Task Administrator** group.

Context

Members of the **Customer Task Administrator** group can bypass the workflows in SAP Ariba to force complete tasks in a contract or sourcing project. When they force complete a task, **Customer Task Administrator** users can select a relevant **AltStatus** value and, optionally, add a descriptive comment for the action.

The force complete option can be exercised to close irrelevant or timed-out tasks, such as tasks that were inadvertently created, triggered by erroneous actions elsewhere, or remain incomplete in the system because of actions carried out outside SAP Ariba. You can force complete to-do tasks, review tasks, approval tasks, negotiation tasks in contract projects, signature tasks, and notification tasks.

> ⓘ Note
>
> When you force complete a task, the predecessor or follow-on tasks of the selected task are not validated. Force completing a task might impact automated workflows associated with the selected task.

The **Force Complete Task** action is not available for the following tasks, which are event-only tasks:

- **Approval for Publish**
- **Approval for Award**
- **Review for Team Grading**
- **Approval for Team Grading**
- **Approval for Timing Change**

Procedure

1. From the project, identify the task that you want to force complete and click **Actions** > **Force Complete Task**.

   The **Force Complete Task** page appears.
2. Select an **AltStatus** value and, optionally, enter a comment to provide additional information about force completing the selected task.

   If you want to cancel the task instead of closing it, you can select **Cancelled** from the **AltStatus** dropdown.

   The following table lists the status, altstatus, and UI status options for tasks can be force completed:

Task Type	Status	Altstatus	UI Status
To-do	Completed	(empty string)	Complete
		Cancelled	Cancelled
Review task	Completed	Reviewed	Reviewed
		Cancelled	Cancelled
Approval task	Completed	Approved	Approved
		Cancelled	Cancelled
Negotiation task	Completed	Reviewed	Complete

Task Type	Status	Altstatus	UI Status
		Cancelled	Cancelled
Signature task	Completed	Signed	Signed
		Cancelled	Cancelled
Notification task	Completed	(empty string)	Complete
		Cancelled	Cancelled

3. Click **OK**.

   The status of the task is updated, as listed in the **UI status** column of the table in the previous step, in the **Task History** tab and the history tab of the project.

Results

Force completing a task results in the following:

- Triggers any condition associated with the field settings option of the task.
- Triggers any auto-starting task associated with the task.
- Triggers email notifications to task owners and observers.
- Invalidates links or email approvals associated with the task, including any cancelled task.

> ⓘ Note
>
> When a task is force completed, associated documents are not published.

Approval, Review, and Negotiation Flows

An approval, review, or negotiation flow defines the users assigned to approve or review a document for a task. SAP Ariba activates approvers in order from left to right. When SAP Ariba activates an approver, it assigns the task to the approver and sends the approver an email notification about the task. The task also appears in the approver's My Tasks list.

> ⓘ Note
>
> The term "approval flow" is an encompassing term that includes review flows (used in review tasks), negotiation flows (used in negotiation tasks), and approval flows (used in approval tasks). In addition, the term "approver" can refer to either approvers in an approval flow or to reviewers in a review flow.

About Approvers and Reviewers [page 409]

Approval Flows Creation and Modification [page 412]

Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]

Using the Approval Flow Editor [page 414]

Approval Flows Filtering [page 416]

About Approvers and Reviewers

The term “approver” can refer to either approvers in an approval flow or to reviewers in a review flow.

Parent topic: Approval, Review, and Negotiation Flows [page 408]

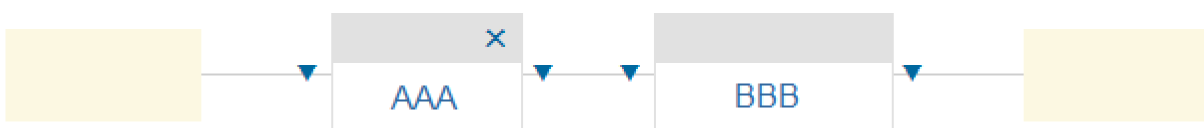
Related Information

Approval Flows Creation and Modification [page 412]
Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]
Using the Approval Flow Editor [page 414]
Approval Flows Filtering [page 416]

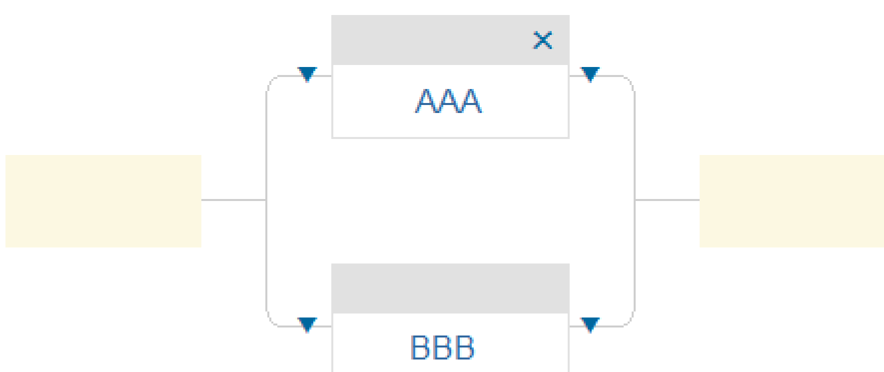
Serial and Parallel Approvers

Approvers (or reviewers) can be serial or parallel approvers.

Serial approvers are assigned consecutively in the order they appear in the approval flow diagram (from left to right). SAP Ariba does not activate a node in a flow (assign a task to the approver in the node) until the preceding approvers (approvers to the left in the approval flow) have submitted approvals or reviews. In the following approval flow, SAP Ariba first assigns the task to user AAA. After AAA submits his or her approval, SAP Ariba assigns the task to user BBB.



Parallel approvers are assigned simultaneously. SAP Ariba assigns the task to the approvers at the same time. In the following approval flow, SAP Ariba assigns the task to users AAA and BBB at the same time.

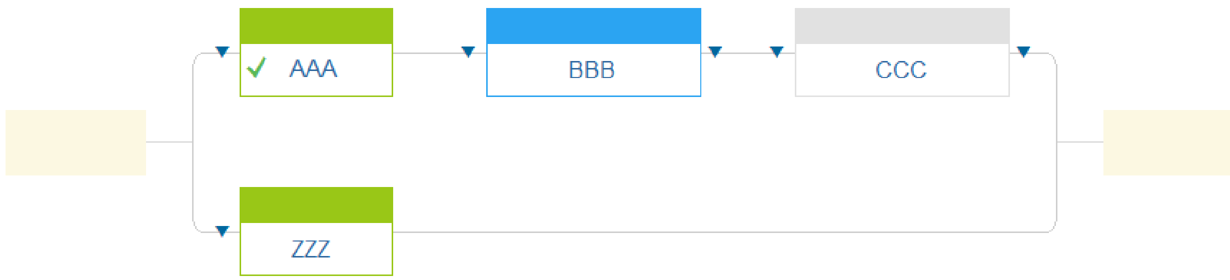


An approval flow can contain a combination of both parallel and serial approvers.

Status of Approvers in Approval Flows

The approval flow editor has a graphic user interface that displays the status of each approver (or reviewer), also referred to as a node, in the approval flow. For example:

Each node shows its status as follows:



- Approved: green with green check mark (✓)
  The user AAA has approved or reviewed the document.
- Active: blue
  The user BBB is the active reviewer. The approval flow is “waiting” for the user to approve or review the document. The user BBB has received an email notification for the task and the task appears in BBB’s **My Tasks** list.
- Pending: gray
  The user CCC is a pending reviewer. CCC is not assigned to the task until BBB completes his or her review; CCC will not receive an email notification about the task and the task does not appear in CCC’s **My Tasks** list until CCC becomes the active reviewer.
- Watcher: green without the checkmark
  The user ZZZ is a watcher. ZZZ cannot review the document, but ZZZ can view the task and monitor the progress of the approval flow. The approval flow proceeds regardless of ZZZ’s actions.

Although it is not pictured in this example, when an approver has denied a task, the node shows red with an exclamation point (⚠).

For more information about using the approval flow editor, see Creating and Modifying Approval Flows [page 412].

Groups in Approval Flows

When you add a group to an approval (or review) flow, SAP Ariba can either:

- Expand the group (and any subgroups) and insert each user as a parallel approver (or reviewer) in the approval flow. Each user receives notification about the task. All users in the group are needed to approve (or review) the document. After all users in the group approves (or reviews) the document, the approval flow moves to successive approvers.
- Insert the group as a single unit in the approval flow. All users in the group receive notification about the task. Any one user in the group is sufficient to approve the task (or move to the next approver in a serial flow).

The behavior when you add a group to an approval flow is determined by the method you use to add the approver.

- If you add a group using the graphical approval flow editor, the pane for adding an approver contains the option **All approvers need to approve**? If you select **No**, SAP Ariba inserts the group as a single unit in the approval flow. If you select **Yes**, SAP Ariba expands the group and inserts each user as a parallel approver. The default value is **No**.
- If you add a group as an approver directly in an editable **Approvers** or **Reviewers** field in a task window for a serial or parallel approval flow, SAP Ariba does not expand the group.
- If the group was inherited from an approver lookup table file in the template, SAP Ariba does not expand the group.

Groups from Templates Published Prior to Release 10s2

The behavior for group expansion is unchanged for projects created from templates that were published prior to 10s2. This behavior was controlled by system parameters. Templates published prior to release 10s2 retain the group expansion behavior according to the SAP Ariba parameter values for your installation. The default system parameter values expanded groups added to review flows but did not expand groups added to approval flows in approval tasks or negotiation flows.

Nonremovable Approvers in Approval Flows

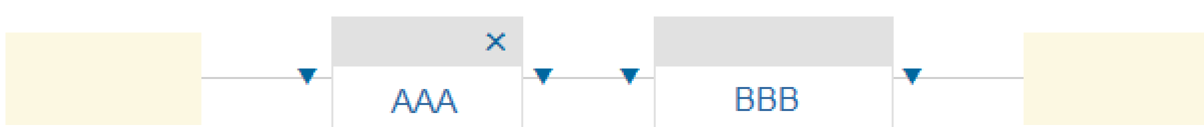
SAP Ariba has a hierarchy of capabilities in which:

- Template authors have more authority than task owners, approvers (or reviewers), and watchers
- Task owners have more authority than approvers (or reviewers), and watchers

In accordance with this hierarchy:

- Task owners cannot delete approvers (or reviewers) specified in the template (added by the template author).
- Approvers (or reviewers) and watchers cannot delete approvers specified in the template or added by the task owner.
- Task owners can remove approvers (or reviewers) added by approvers.

The approval rule editor uses a icon button (✕) for users that can be removed. Users that cannot be removed from an approval flow because of the above stipulations do not have the delete icon. In the following approval flow for a task in a project, user AAA can be removed. User BB was specified in the template and cannot be removed.



Removal and Addition of Approvers in Task Rounds

Approvers added to a task before the task is submitted cannot be removed after the task is submitted for that round. However, these approvers can be removed in any subsequent rounds (if the approvers were not specified in the project template).

Approvers added after a task is submitted are retained only for the current round. If a new review or approval round is created, the new round does not include any approvers added after the task was submitted.

If you click the **Properties** tab for a task, you see only the reviewers or approvers in the flow that were present when the task was submitted. SAP Ariba does not show reviewers or approvers added after the task was submitted. To view reviewers or approvers that were added after the task was submitted, you must click **View Task Details** and then click the **Review Flow**, **Negotiation Flow**, or **Approval Flow** tab.

Approval Flows Creation and Modification

The term "approval flow" is an encompassing term that includes review flows (used in review tasks), negotiation flows (used in negotiation tasks), and approval flows (used in approval tasks). In addition, the term "approver" can refer to either approvers in an approval flow or to reviewers in a review flow.

This topic describes how to create and modify approval flows. For information about how approval flows progress and operate, see Approval, Review, and Negotiation Flows [page 408].

There are two ways to create and modify approval flows:

- Using the approval flow editor. The approval flow editor has a graphic user interface that enables you to create or modify custom approval flows that contain both parallel and serial approvers.
  If you are editing a task with an approval flow that already contains approvers, you must use the approval flow editor to modify the approval flow.
- Entering approvers in an editable **Approvers** or **Reviewers** field within a task page. This method is available only if you are creating a new task or editing a task with an approval flow that contains no approvers.
  Using an editable **Reviewers** or **Approvers** field to create or modify approval flows enables you to create simple approval flows with restrictions. For a list of restrictions, see Using the Approvers or Reviewers Field to Create Approval Flows [page 413].

Parent topic: Approval, Review, and Negotiation Flows [page 408]

Related Information

About Approvers and Reviewers [page 409]
Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]
Using the Approval Flow Editor [page 414]
Approval Flows Filtering [page 416]
Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]
Using the Approval Flow Editor [page 414]

Using the Approvers or Reviewers Field to Create Simple Approval Flows

This procedure describes how to use the approvers or reviewers field to create simple approval flows.

Context

You can use an editable **Reviewers** or **Approvers** field on a task page to create or modify simple approval flows with the following restrictions:

- The approval flow can contain either parallel or serial approvers, but not both parallel and serial approvers.
- You cannot move approvers in the flow.
- If you select a group as an approver, there is no option to expand the group and require all users in the group to approve (or review) the document. Only one user in the group is needed to approve (or review) the document. After one user in the group approves (or reviews) the document, the approval flow moves to successive approvers. If you want to require all users in a group to approve a document, you must add the group using the approval flow editor.
- You cannot add watchers to the flow.

If you want to create an approval flow with both parallel and serial approvers or work around any other restrictions, you must use the approval flow editor. See Opening the Approval Flow Editor [page 414].

To use the **Approvers** or **Reviewers** field:

Procedure

1. Create a task or new task round, or open a task that was inherited from the project template. The task must be editable and cannot have a custom approval flow. The create task or task page contains a **Reviewers** or **Approvers** field and an **Approval Rule Flow Types** area.
2. For the **Approval Rule Flow Type**, select the **Parallel** or **Serial** radio button (see About Serial and Parallel Approvers [page 409] for descriptions of parallel and serial approvers). The default is **Parallel**.
3. Click the down arrow in the **Reviewers** or **Approvers** field ( ).
4. Select the users you want to add to the flow.

> **Note**
>
> If you are creating or editing a serial approval flow, add the users from last to first. When you add a serial approver, the approver is inserted at the beginning of the approval flow; the last approver you specify will be the first approver in the flow.

Task overview: Approval, Review, and Negotiation Flows [page 408]

Related Information

[About Approvers and Reviewers [page 409]]
[Approval Flows Creation and Modification [page 412]]
[Using the Approval Flow Editor [page 414]]
[Approval Flows Filtering [page 416]]

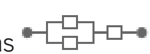
Using the Approval Flow Editor

This procedure describes how to use the approval flow editor.

Context

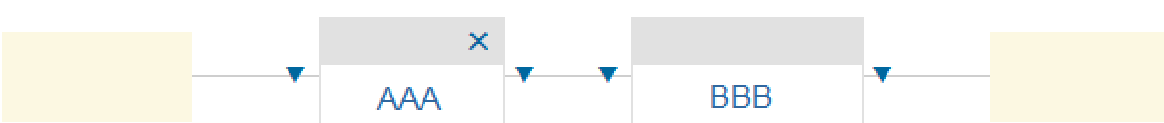
The approval flow editor enables you to create approval flows that contain both parallel and serial approvers. If you want to create or edit a simple approval flow, you might be able to add approvers using the procedure described in Using the Approvers or Reviewers Field to Create Approval Flows [page 413].

Procedure

1. Use one of the following methods to open the approval editor:
    - In the window for a new task or task without an approval flow, navigate to the **Approvers** or **Reviewers** field, then click one of the following:
        - an approval flow icon (such as ).
        - a link for an approval flow type (**Parallel**, **Serial**, or **Custom)**.
    - If you are working on an existing task with an approval flow, click **View Task Details**, then click the **Review Flow**, **Negotiation Flow**, or **Approval Flow** tab.

    If this is a new (empty) approval flow, you will see a graph with an **Add Initial Approver** button.

    If there are nodes (approvers or reviewers) in the flow, you will see a graph with nodes and clickable items similar to the following:

    You can click an action triangle (▽) to move or add approvers, or you can click the delete icon (✕) to delete any approvers you have permission to delete.
2. To add approvers or reviewers:

a. Click the area in the approval flow where you want to add the approver (or reviewer).
   - If there are no approvers in the approval flow, click **Add Initial Approver** to add an approver. This button is available only when there are no approvers.
   - If you are adding serial approver to a flow with existing approvers, click the action triangle icon (?) where you want to add the approval rule.

b. Choose **Add Serial Approver** or **Add Parallel Approver** (see About Serial and Parallel Approvers [page 409] for descriptions of parallel and serial approvers).

c. In the **Add Approval Request** pane, enter the name of the approver you want to add or use the chooser to select an approver. If you are adding an approver for a review or negotiation task, you can click **New External Reviewer** to specify the email to add an email address for an external reviewer not already configured in the system.

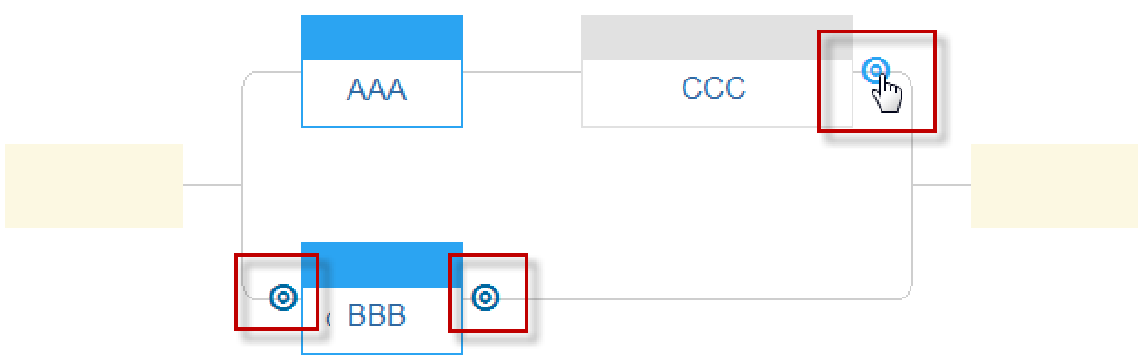
d. Specify parameter values as follows:
   - **Required**: Click **Approver** to add the approver as a required approver or click **Watcher** to add the approver as a watcher; a watcher cannot review or approve the document, but can view the task and monitor the progress of the approval flow. For more information about watchers, see Task Owners and Participants [page 307].
   - **All approvers need to approve**: This field is used when adding a global group or project group to the approval flow. If you click **Yes**, SAP Ariba expands the group and adds each user in the group as an individual node in the approval flow. Each user in the group must approve (or review) the document. If you click **No**, only one user in the group is needed to approve (or review) the document. After one user in the group approves (or reviews) the document, the approval flow moves to successive approvers.
   - **Provide a Reason**: Reason for adding the approvers.

3. To move approvers or reviewers:

   a. Click a triangle action icon (?)beside the approver (or reviewer) you want to move.

   Choose **Move Approver**.

   Blue targets indicate the possible new positions for the node. In the following image, the user is attempting to move the AAA node:



   b. Click one of the blue targets to move the node to the corresponding position.

   The updated diagram shows the new position of the moved node.

4. To delete approvers or reviewers:

   a. In the box for the approver you want to delete, click the delete icon (✕).

   b. Click **OK** when prompted for confirmation.

SAP Ariba has an implicit hierarchy of capabilities restricts the approvers that task owners and approvers can delete. For more information, see About Nonremovable Approvers in Approval Flows [page 411].

Task overview: Approval, Review, and Negotiation Flows [page 408]

Related Information

About Approvers and Reviewers [page 409]
Approval Flows Creation and Modification [page 412]
Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]
Approval Flows Filtering [page 416]

Approval Flows Filtering

Approval filter rules are predefined filters that examine the approval flows and eliminate approval requests from the approval flow.

This is useful in situations when the same approver gets added more than once in an approval flow. Without filtering, if the same approver is added again as a serial approver, they need to approve twice. With filtering, duplicate approvers are removed and only unique approvers remain.

> ⓘ Note
>
> Filter rules remove duplicate approvers added as individual users. Filter rules don't remove duplicate approvers added as groups.

If the approval filter rules functionality is enabled, the approval flow editor has two tabs: **Approval Rules** and **Filter Rules**. The **Approval Rules** tab lets you use the approval flow editor to create approval flows. The **Filter Rules** tab lets you add approval filter rules, view previously added filter rules, and edit filter rules.

This feature is controlled by the site configuration parameter `Application.ACM.ApprovalFilterRules`, which SAP Ariba sets for you. The feature ID is OPCCC-251.

Parent topic: Approval, Review, and Negotiation Flows [page 408]

Related Information

About Approvers and Reviewers [page 409]
Approval Flows Creation and Modification [page 412]
Using the Approvers or Reviewers Field to Create Simple Approval Flows [page 413]
Using the Approval Flow Editor [page 414]

Filter Rule Actions

The following sections describe the predefined filter rule actions.

Remove Duplicates – Retain First Approver

Removes duplicate approvers from the approval flow, preserving only the first approver instance that is not a watcher.

For example, if user Gene Halas is added as an approver by one rule, and a later rule tries to add Gene Halas as an approver or watcher, then the latter is not added.

Remove Duplicates – Retain Last Approver

Removes duplicate approvers from the approval flow, preserving only the last approver instance that is not a watcher.

For example, if user Gene Halas is added as an approver by one rule, and a later rule adds Gene Halas as a required approver, the first occurrence is removed.

Remove Duplicates – Retain Last Approver or Watcher

Removes duplicate approvers from the approval flow, retaining only the last approver or watcher instance.

For example, if user Gene Halas is added as an approver by one rule, and a later rule adds Gene Halas as either an approver or a watcher, the first occurrence is removed.

> Note
>
> This filter rule retains the last instance regardless of whether the instance is an approver or a watcher. If the same approver is added as both a watcher and an approver, the watcher instance is removed and the approver instance is retain

Adding a Filter Rule to an Approval Flow

Use this procedure to add a filter rule to an approval flow.

Context

To configure a filter rule, you choose a predefined filter rule action. Filter rules do not have conditions.

Procedure

1. With the approval task open in edit mode, go to the **Filter Rules** tab.
2. Click **Create New**.
3. Choose an action from the **Actions** pull-down menu.

Related Information

Filter Rule Actions [page 417]

Enabling or Disabling an Existing Filter Rule in an Approval Process

Use this procedure to enable or disable an existing filter rule in an approval process.

Procedure

1. With the approval task open in edit mode, go to the **Filter Rules** tab.
2. Locate the filter rule you want to enable or disable.
3. In the **Enabled** column, click **Yes** to enable the filter rule, or click **No** to disable it.

Managing Task Notification Profiles and Settings

Use this procedure to manage task notification profiles and settings.

Context

When you create a new task in a project, you can choose a notification profile that specifies the following notification settings:

- the time intervals for sending notifications for pending and overdue tasks
- whether or not SAP Ariba sends a notification message when the task is complete
- the recipients for each notification type

Your SAP Ariba solution includes a default notification profile that is available in all project templates. When creating a new task in a project, you can use the default notification profile, use a notification profile from the project template, or specify notification settings that apply to the current task only.

> ⓘ Note
>
> A custom notification profile created in a task only applies to that task. To make additional notification profiles available on all tasks created in a project, you must add new profiles to the project template. For more on creating notification profiles for project templates, see Creating Notification Profiles.

The default notification profile has the following settings:

- Pending notifications
  - Start date: Sent 30 days before the task due date
  - Reminder interval: Send reminders every 7 days after the first notification
  - Recipients: Task owner, task participants (task owner, original owner, approvers, and observers)
- Overdue notifications
  - Start date: Sent every 2 days after the task due date
  - Reminder interval: Send reminders every 2 days after the first notification
  - Recipients: Task owner, task participants (task owner, original owner, approvers, and observers)
- Task complete notification
  - Sent when the task is complete.
  - Recipients: Task participants (task owner, original owner, approvers, and observers)

> ⓘ Note
>
> You can globally manage what notifications you receive from project tasks by enabling or disabling specific notification types in your account's **Email Notification Preferences** area. For information on managing your email notification preferences, refer to About Setting Email Notification Preferences.

Procedure

1. At the bottom of a create task page, expand **Notifications**.
2. Click the **Notification Profile** pull-down menu. SAP Ariba lists notification profiles inherited from the template and the following choices:
   - **Default**, which contains the settings shown and is the profile used by default.
   - **None**, which sends no notification messages.
   - **Custom Profile**, which enables you to specify the notification intervals and recipients.
     If you choose **Custom Profile**, you can specify when SAP Ariba sends the notifications (as offsets in days). You can also click on the recipients and select or remove recipient groups.

Exporting Task Summaries to Excel

Use this procedure to export task summaries to Excel.

Context

SAP Ariba can export a summary of the tasks and phases in a project to Microsoft Excel. The export file contains the following information for each phase or task:

- Task name
- Document associated with the task
- Task owner
- Status
- Due date

SAP Ariba exports this information in text format only. For information about operations that export task information and create task objects in Microsoft Project or Microsoft Outlook, see Integration of SAP Ariba Projects with Microsoft Project [page 120] and Exporting Tasks to Microsoft Outlook [page 118].

Procedure

1. Open **Tasks** tab in a project. (If the **Tasks** tab is not visible, navigate to the **Overview** area and choose **Actions** > **Display Full View**.)
2. Click the table icon and choose **Export to Excel** > **Export all Rows**.

Exporting the Contract Approval Workflow History to PDF

Use this procedure to export the contract approval workflow history to PDF.

Context

SAP Ariba can export a summary of the tasks and phases in a project to PDF (Portable Document Format). The exported file contains the following information for each approval task:

- Task name
- Task owner
- Status of approval for that owner (that is, whether approved or denied)
- Date on which the status was updated

Procedure

1. Open the **Tasks** tab in a project. (If the **Tasks** tab is not visible, navigate to the **Overview** area and choose **Actions** > **Display Full View**.)
2. Click the task for which you want to export the task history, and choose **View Task Details**.
3. Click the **Task History** tab.
4. Click the table icon to open the table options menu, and choose **Export to PDF**.

Actions You Can Perform from the Tasks Tab

To Do This...	Choose...
Control task display	The table icon and choose **View By** to change the task listing (by owner, or status, for example), or choose **Show/Hide Columns** to show or hide columns.
Expand all collapsed phases, or collapse them	The table icon and choose **Outline Expansion** > **Expand All** or **Collapse All**. (In most cases, it is more useful to use the expand and collapse arrow for an individual phase.)
Export a list of tasks to Microsoft Excel	The table icon and choose **Export to Excel** > **Export all Rows** or **Export Current Page**. For more information, see Exporting Task Summaries to Excel [page 420].
Export the contract approval workflow history to PDF	The task for which you want to export the task history, and choose **View Task Details**. Then click the **Task History** tab, click the table icon, and choose **Export to PDF**.

To Do This...	Choose...
View task details and process review rounds	The task name and choose **View Task Details**. You can view the task status, owner, whether it is a milestone, due date, start date, the observers, whether it is required, and the predecessor tasks. If the task is a document task, you can also process review rounds (process review comments, cancel or withdraw rounds, start new rounds, mark rounds complete).
Edit the task	The task name and choose **Edit Task**. You can edit the task title, the owner, whether it is a milestone, the completion date, the start date, the observers, whether it is required, and the predecessor tasks.
Open the associated supplier workspace (SAP Ariba Supplier Management only)	The task and choose **Open Supplier Workspace**. This action is only available for Approval tasks in supplier workspaces.
Mark a To Do task as complete	The task name and choose **Mark Complete**. The task status changes to Complete.
Mark a To Do task as started	The task name and choose **Mark Started**. The task status changes to In Progress.
Reactivate a completed To Do task	The task name and choose **Reactivate**. This changes the status of the task from **Complete** to **Not Started**.
Associate documents with a task, or change the document associated with a task	The task name and choose **Associate Document**. This enables you to either change the document associated with the task or change the task type. For example, if you associate a document to a To Do task, you can then change the task type to Review Task. For more information, see Associating a Document with a To Do Task [page 319].
Create a new phase	**Actions** > **Create** > **Phase** to create a phase for organizing your tasks. You can format the phase description text with bold, italic, underlining, lists, or colors.
Create a To Do task	**Actions** > **Create** > **To Do Task** to create a To Do task, which is a simple task to help you keep track of actions you or other team members should perform. You can format the task description with bold, italic, underlining, lists, or colors.
Cancel optional tasks	**Actions** > **Cancel** > **Optional Tasks** to cancel non-required tasks. This can help clarify what is important for the project if your group has accumulated too many optional tasks.
Add committed due dates for tasks	**Actions** > **Commit** > **Due Dates** to add dates in the Due Date field for each task into the Committed column of the Tasks page. You can use this date to keep track of project progress and track externally committed due dates. Only the project owner can commit due dates. Committed due dates do not affect review or approval process due dates but can be used in email templates for task notifications. For more information about email templates, see Project Administration Guide. **Note** Task due dates are expressed in calendar dates and do not take time zones into account. This means that, from a task owner's point of view, that a task might be completed a day earlier or a day later depending on the time zone of the individual assigned to complete the task.
Import or export the task list to Microsoft Project	**Actions** > **Microsoft Project** > **Import/Export** to import or export your task list. For more information, see Integration of SAP Ariba Projects with Microsoft Project [page 120].

Export of Project Data

Export of Master Data Elements

Master Data Elements generally consist of users, suppliers, customers, units of measure, commodity codes. You can download these elements to CSV files using export tasks in Ariba Administrator. For instructions on how to download these elements, see Exporting Data to Files in Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.

Export of Project Data

You can export the following data from projects:

- Header fields for all contract workspaces. See SOAP Web Service API Integration Guide.
- The tasks and phases in a single project to Microsoft Project. See Integration of SAP Ariba Projects with Microsoft Project [page 120].
- A summary of the tasks in a single project as text items to Microsoft Excel. See Exporting Task Summaries to Excel [page 420].
- The tasks assigned to a specific user (from a user's My Tasks area) to Microsoft Outlook. See Exporting Tasks to Microsoft Outlook [page 118].
- The documents in a project, including assembled contract documents. To export documents, you must open each document in the appropriate application and save them to a local file.

Export of Project Templates

You can export a project template. See Project Template Management and Exporting Project Templates in Project Template Guide.

Export of Reports

See Creating Report Export Templates.

Export of the Clause Library

See Clause Library and About Exporting and Importing the Clause Library in Contract authoring guide.

Site Configuration Options for Projects, Teams, Documents, and Tasks

Site configuration options are set for you by SAP Ariba.

Site Configuration Options for Projects

Site Configuration Options for Contract Amendments

Application.ACM.EnableTemplateVersionUpgrade

The parameter `Application.ACM.EnableTemplateVersionUpgrade` must be set to `Yes` to enable the template version upgrade feature. This feature enables you to apply the latest project template to a contract workspace if an **Amendment**, **Renewal**, or **Termination** amendment is created as described in About Applying New Project Template Versions with Contract Amendments [page 73]. The default value is `No`.

This parameter can be configured with the Intelligent Configuration Manager. For more information, refer to the **Related Information** section below.

Related Information

Enable template version upgrade

Application.ACM.AskBeforeTemplateVersionUpgrade

The parameter `Application.ACM.AskBeforeTemplateVersionUpgrade` specifies whether or not the SAP Ariba solution will ask the user before updating a project. The default value is `Yes`. When this parameter is set to `Yes` (and the template version upgrade feature is enabled) the **Amend** page includes an **Upgrade Template Version** option that enables users to choose to update the workspace being amended. When this parameter is set to `No`, the SAP Ariba solution always behaves as if the user has chosen to update a workspace being amended.

This parameter can be configured with the Intelligent Configuration Manager. For more information, refer to the **Related Information** section below.

Related Information

Enable user confirmation for template upgrade during contract amendment

Application.ACM.FullTemplateVersionUpgrade

The parameter `Application.ACM.FullTemplateVersionUpgrade` specifies if document changes and additions to project teams in a project template are propagated when a template upgrade is applied for contract workspace amendments. If this parameter is set to **Yes** and template upgrade is applied to a contract workspace, modifications to existing ordinary documents (documents that are not assembled contract documents or Contract Terms) in the template are propagated to the workspace if the documents have not been modified in the workspace.

In addition, new group members added to existing template project groups are added to the workspace.

If this parameter is set to **No**, modifications to existing documents in the template are not applied to workspace and members are not added to existing project groups.

This parameter is ignored if `Application.ACM.EnableTemplateVersionUpgrade` is set to **No**.

This parameter can be configured with the Intelligent Configuration Manager. For more information, refer to the **Related Information** section below.

Related Information

Enable full template version upgrade

Application.ACM.TemplateVersionUpgradeKeepPreviousAnswers

The parameter `Application.ACM.TemplateVersionUpgradeKeepPreviousAnswer` specifies if responses to template questions are retained when a template upgrade is applied for contract workspace amendments. The default value is `false` (do not retain responses; the responses are set to the default values).

This parameter can be configured with the Intelligent Configuration Manager. For more information, refer to the **Related Information** section below.

Related Information

Enable answer retention during template upgrade

Application.ACM.TemplateUpgradeForContractWorkspacesWithAssembledDocuments

This paramater enables template upgrade for contract workspaces that contain assembled documents such as the main agreement and contract addendum.

If the contract workspace for which you are upgrading the template contains assembled documents, during the template upgrade you receive a warning stating that the assembled documents, including finalized documents, in the contract workspace will be replaced with the latest version from the template. Only if you confirm the upgrade, the contract workspace and the assembled documents are upgraded to the new version of the template.

You can do a template upgrade for a contract workspace as part of an amendment of type **Amendment** or **Renewal**.

If an assembled document was overwritten during a template upgrade, you can download the previous version from the **View Details** > **Version history** page and upload that to replace the version created by the template upgrade.

Prerequisites

- Your site must have Enhanced Contract Authoring enabled.
- Your site must have the ICM parameter `Application.ACM.EnableTemplateVersionUpgrade` enabled.

Restrictions

- When you do a template upgrade for a contract workspace, any assembled document, including any finalized document, in the workspace are replaced with the latest version from the template.
- You cannot perform template upgrade for workspaces that contain assembled document when you do an amendment of type **Termination**.

Related Information

Template upgrade for contract workspaces with assembled documents

Application.ACM.TemplateUpgradeForDocumentTask

The `Application.ACM.TemplateUpgradeForDocumentTask` parameter specifies whether the document tasks in the contract workspace will be updated when a template upgrade is applied for contract workspace amendments. The default value is **No**, which indicates that the document tasks are not updated. If set to **Yes**, the document tasks are updated when the template is upgraded.

This parameter can be configured with the Intelligent Configuration Manager. For more information, refer to the **Related Information** section below.

Related Information

Update document tasks during template upgrade

Site Configuration Options for Contract Term Notifications

Application.ACM.EnableContractRequestExpirationAndNoticeEmail

The `Application.ACM.EnableContractRequestExpirationAndNoticeEmail` option specifies if expiration and notice period notifications are sent for SAP Ariba Contracts contract requests. If `false`, do not send expiration and notice period notifications for contract requests and do not show expiration and notice period email fields for contract requests. The default value is `false`.

Site Configuration Options for Deleting Projects

Application.ACM.ProjectDeleteLimited

If the `Application.ACM.ProjectDeleteLimited` option is `false`, project owners can delete projects regardless of the status of any tasks, events, or surveys (or contract status, if this is an SAP Ariba Contracts project). The default value for this option is `true` (project owners cannot delete projects if any project tasks have started, there are any running or pending events or surveys, or the project is a contract workspace and it has been published or amended).

Site Configuration Options for Project Teams

`Application.ACM.InheritTeam.ParentProjectTeamIsConsideredSubprojectTeam` (set by SAP Ariba Support)

Specifies if members of a subproject inherited from the parent project (the template option **Inherits Team from Parent** is **Yes**) retain team membership capabilities in the subproject even if they are later removed from the subproject. The default value is `Yes`.

`Application.ACM.ProjectAccessControl.CanManageSubProjectIfCanManageParentProject` (set by SAP Ariba Support)

Specifies if members in a subproject inherited from the parent project (the template option **Inherits Team from Parent** is **Yes**) that have Project Owner capabilities in the parent project also have Project Owner capabilities in the subproject. The default value is `Yes`.

Site Configuration Options for Project Documents

Site Configuration Options for Contract Line Items Documents

`Application.ACM.ContractLineItemsDocument.DiffInBackgroundLimit` (set by SAP Ariba Support)

This parameter controls the size beyond which the difference operation for comparing versions of a contract line items document (CLID) is processed in the background. This value of this parameter is compared with the product of the number of items in the CLID and the number of custom attributes per item. For example, if this parameter is set to 5000, a CLID having 100 items and 50 custom terms in each line item is processed in the background. Similarly, a CLID with 1000 items and 5 terms per item is also moved to the background.

The default value of this parameter is **5000**.

`Application.ACM.IsCommodityCodeMandatoryInContracts.Enabled` (set by SAP Ariba Support)

Specifies whether a value is required in the **Commodity** field for each item in a contract line items document (CLID). When this parameter is set to Yes, the CLID can be published only if it contains the commodity code for all the line items.The default value is `Yes`.

`Application.ACM.IsContractLineItemDescriptionMandatory.Enabled` (set by SAP Ariba Support)

Specifies whether each line item in a contract line items document (CLID) requires a description. When this parameter is set to `Yes`, the CLID can be published only if it contains descriptions for all the line items. The default value is `Yes`.

Site Configuration Options for Extracting ZIP File Contents

Application.ACM.Unzip.ExtractedFilesLimit

Specifies the maximum number of files that can be extracted in an unzip operation. The default and maximum value is 100 (files).

Application.ACM.Unzip.ExtractionSizeLimit

Specifies the maximum bytes allowed per unzip operation. The default and maximum value is 1073741824 (1GB).

Application.ACM.Unzip.FileDepthLimit

Specifies the maximum depth for subfolders created per unzip operation. The default and maximum value is 6.

Self-Service Site Configuration Options for Savings Forms

Allow currencies in savings allocation details

Allows users to select a currency for each savings allocation detail (line) in a savings form.

ID	`Application.AQS.EnableSavingsAllocationCurrencySelector`
Name	**Allow currencies in savings allocation details**
Default value	**No**

Savings forms let you break down or allocate savings data by time or other fields (dimensions), such as commodity, region, and department. If this parameter is set to **Yes**, users can select a **Currency** for each entry (line) in savings allocation details within a savings form. If this parameter is set to **No**, the event currency is used for all entries in savings allocation details.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager Administration
Use of Savings Forms to Track Savings [page 166]
Parameter Management in Intelligent Configuration Manager

Enable savings forms

Allows users to create a savings form in full sourcing projects. In addition, customers with both SAP Ariba Sourcing and SAP Ariba Contracts can create savings forms in procurement contract workspaces and requests.

ID	`Application.AQS.EnableSavingsForm`
Name	**Enable savings forms**
Default value	**No**

If this parameter is set to **Yes**, users can create savings forms in full sourcing projects. In addition, customers with both SAP Ariba Sourcing and SAP Ariba Contracts can create savings forms in procurement contract workspaces and requests. The **Documents** area in these projects include a **Create** > **Savings Form** option.

If this parameter is set to **No**, users cannot create savings forms.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager Administration
Use of Savings Forms to Track Savings [page 166]
Parameter Management in Intelligent Configuration Manager

Site Configuration Options for Tasks

Site Configuration Options for All Task Types

Application.ACM.MinDaysCompletedTasksStayOnToDoPortlet

This parameter specifies the number of days a completed task remains in the To Do portlet. The default value is 7.

Application.ACM.TasksAllowSubmissionOfUneditedDocuments

By default, the project owner must open or publish a document in a Not Edited state before submitting a review or approval task for the document. This requirement is controlled by the parameter `Application.ACM.TasksAllowSubmissionOfUneditedDocuments`.

Application.Approvable.AllowEmailHTMLComments

When processing comments included in an email approver's reply, SAP Ariba generally removes text that might be an HTML tag (text enclosed by angle brackets) unless the text is a simple HTML formatting tag. If the text is a simple HTML formatting tag, SAP Ariba retains the tag and the tag is used to format the text in the Task History.

If you see text in a Task History that is enclosed by angle brackets, the approver's email application might have inserted HTML tags with encoded angle brackets. To remove this text, the `Application.Approvable.AllowEmailHTMLComments` parameter can be set to `No` (the default value is `Yes`).

Application.Base.EmailApprovalEnabled

The parameter `Application.Base.EmailApprovalEnabled` must be set to `Yes` to use the email approval feature.

Application.ACM.ShowInitialMessageInEmailNotification

By default, `Application.ACM.ShowInitialMessageInEmailNotification` is set to `false`, email notifications that use the `TASK_COMMENT_TEXT` token (such as the notification sent to the task owner when a user has approved a document) will show the most recent comment added, such as a comment added by a reviewer or approver.

If `Application.ACM.ShowInitialMessageInEmailNotification` is set to `true`, email notifications that use the `TASK_COMMENT_TEXT` token will show the initial comment for the task, such as the comment added by the task owner when the task was created.

Self-Service Site Configuration Parameters for Copying Projects

Ask users if they want to copy project groups when copying projects

Specifies whether users are asked if they want to copy project groups when copying projects.

ID	`Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject`
Name	**Ask users if they want to copy project groups when copying projects**
Default value	**Yes**

The behavior for `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject` is also determined by the value for `Application.ACM.CopyProject.DefaultAnswerForProjectGroupCopyWhenCopyingProject`.

- If `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject` is `Yes`, a user copying a project is asked which project groups to copy. The question can be **Do you want to copy project groups that were not in the template and changes made to the project groups that were in the template?** or **Do you want to copy project groups that were not in the template, from the project being copied?** Although the questions might differ, the results are not affected by the question; only the user's response affects the results.
  - If the user answers **Yes**, the new project is created with all the groups from the source project, including ad hoc groups (groups not inherited from the project template). All changes to inherited project groups at the time the source project is copied are copied to the new project.
  - If the user answers **No**, the new project is created with only the groups from the source project that were inherited from the project template (ad hoc groups are not copied). Changes made to inherited project groups are not copied to the new project.
- If `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject` is `No`, a user copying a project is not asked which project groups to copy and the groups copied are determined by the value of `Application.ACM.CopyProject.DefaultAnswerForProjectGroupCopyWhenCopyingProject`.
  - If `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject` is `No`, and `Application.ACM.CopyProject.DefaultAnswerForProjectGroupCopyWhenCopyingProject` is `Yes`, the new project is created with all the groups from the source project, including ad hoc groups. All changes to inherited project groups at the time the source project is copied are copied to the new project.
  - If `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject` is `No`, and `Application.ACM.CopyProject.DefaultAnswerForProjectGroupCopyWhenCopyingProject` is `No`, the new project is created with only the groups from the source project that were inherited from the project template (ad hoc groups are not copied). Changes made to inherited project groups are not copied to the new project.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Ask users if they want to include ad hoc tasks when copying projects

Specifies if users copying a project are asked **Do you want to copy project phases/tasks that were not in the template, from the project being copied?** This parameter affects SAP Ariba solutions only if documents and project groups are copied when a project is copied.

ID	`Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject`
Name	**Ask users if they want to include ad hoc tasks when copying projects**
Default value	**Yes**

The parameters `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` and `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` operate together.

The `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` and `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` parameters are used only when documents and project groups are copied when a project is copied, as based on user responses and the values for `Application.ACM.CopyProject.AllowDocumentCopyWhenCopyingProject` and `Application.ACM.CopyProject.AllowProjectGroupCopyWhenCopyingProject`.

If documents and project groups are not copied when a project is copied, no tasks or phases are copied.

- If documents and project groups are copied when a project is copied and `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` is `Yes`, `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` is ignored. The user copying the project is asked **Do you want to copy project phases/tasks that were not in the template, from the project being copied?**
  - If the user responds **Yes**, the new project is created with all tasks and phases from the source project.
  - If the user responds **No**, the new project is created with only the tasks and phases that were inherited from the project template and not modified.
- If documents and project groups are copied when a project is copied and `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` is `No`, the results depend on the value of `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject`.
  - If `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` is `Yes`, the new project is created with all tasks and phases from the source project.
  - If `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` is `No`, the new project is created with only the tasks and phases that were inherited from the project template and not modified.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Default answer for document copy when copying projects

Determines the behavior copying a project when `Application.ACM.CopyProject.AllowDocumentCopyWhenCopyingProject` is **No**. If **Yes**, the new project is created with all documents from the original project. If **No**, the new project is created with only the documents from the source project that were inherited from the project template and not modified.

ID	`Application.ACM.CopyProject.DefaultAnswerForDocumentCopyWhenCopyingProject`

Name	**Default answer for document copy when copying projects**
Default value	**Yes**

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Include modified and ad hoc documents when copying projects [page 436]
Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Default answer for task copy when copying projects

Determines the behavior when documents and project groups are copied when a project is copied and `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` is **No**.

ID	`Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject`
Name	**Default answer for task copy when copying projects**
Default value	**Yes**

If documents and project groups are copied when a project is copied and `Application.ACM.CopyProject.AllowTaskCopyWhenCopyingProject` is `No`, the results depend on the value of `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject`.

- If `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` is `Yes`, the new project is created with all tasks and phases from the source project.
- If `Application.ACM.CopyProject.DefaultAnswerForTaskCopyWhenCopyingProject` is `No`, the new project is created with only the tasks and phases that were inherited from the project template and not modified.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Ask users if they want to include ad hoc tasks when copying projects [page 433]
Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Include modified and ad hoc documents when copying projects

Specifies if users copying a project are asked **Do you want to copy documents that were modified in the project being copied?** If **Yes**, users copying a project are asked. If **No**, users aren't asked and the documents copied are determined by the value of `Application.ACM.CopyProject.DefaultAnswerForDocumentCopyWhenCopyingProject`.

Full name	`Application.ACM.CopyProject.AllowDocumentCopyWhenCopyingProject`
Name	**Include modified and ad hoc documents when copying projects**
Default value	**Yes**

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Default answer for document copy when copying projects [page 434]
Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Require Project Owner capabilities to copy projects

Requires users to have project owner capabilities to copy projects.

ID	`Application.ACM.RestrictCopyProjectToOwner`
Name	**Require Project Owner capabilities to copy projects**
Default value	**Yes**

When this parameter is set to **Yes**, only users with project ownership capabilities can create a copy of a project. When this parameter is set to **No**, a user can create a copy of a project if the user has the ability to create a project of that type.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Synchronize currency conversion rates from procurement

Ensures that updates to currency conversion rate sets are synchronized from SAP Ariba Procurement solutions to SAP Ariba strategic sourcing solutions.

ID	`Application.AQS.EnableCurrencyConversionRateSetSync`
Name	**Synchronize currency conversion rates from procurement**
Default value	**No**

Set this parameter to **Yes** if your site is integrated with SAP Ariba Procurement solutions to ensure that conversion rate sets exported from SAP Ariba Procurement solutions are available in transactions for SAP Ariba strategic sourcing solutions.

Note that SAP Ariba Sourcing is not currently capable of doing reverse lookup using the currency conversion rates `FromCurrency` or doing triangulation when getting the list of currencies to display in the **Exchange Rates** table. Therefore, if the `ToCurrency` of the currency conversion rates exported from SAP Ariba Procurement solutions does not match the event **Currency**, they are not displayed in the **Exchange Rates** table for sourcing events.

If your site is not a suite-integrated site, set this parameter to **No**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Self-Service Site Configuration Parameters for Managing Project Email Notifications

Send email to task owner when project is created

Specifies whether to send an email to the task owner when a project is created.

ID	`Application.ACM.SendNotificationForTaskAssignmentDuringProjectCreate`
Name	**Send email to task owner when project is created**
Default value	**No**

By default, SAP Ariba sends a project status change email message to members of all project groups that have the **Active Team Member** role when a project is created from the dashboard except users placed in the **Project Owner** group at project creation time. This includes:

- The user creating the project
- Any users who were added to the **Project Owner** group in the project template using a team member rules file

To send an email notification to project owners in addition to other project team members when a project is created from the dashboard, set this parameter to **Yes**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Send email to team when project is created [page 438]
Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Send email to team when project is created

Specifies whether to send an email to team members when a project is created.

ID	`Application.ACM.SendNotificationOnProjectCreate`
Name	**Send email to team when project is created**
Default value	**Yes**

When a project is created from the dashboard, the SAP Ariba solution sends a project status change notification to team members by default. This notification is sent to members of all project groups that have the **Active Team Member** role except users placed in the **Project Owner** group at project creation time.

To suppress notifications sent when projects are created, set this parameter to **No**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Send email to task owner when project is created [page 437]
Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Send email to team when project status changes

Specifies whether to send an email to team members when project status changes.

ID	`Application.ACM.SendNotificationOnProjectStatusChange`
Name	**Send email to team when project status changes**
Default value	**Yes**

By default, project status change notifications are sent to members of all project groups that have the **Active Team Member** role when the **Project State** field changes in the **Overview** area. To suppress these notifications, you can set the `Application.ACM.SendNotificationOnProjectStatusChange` parameter to **No** (the default value is **Yes**).

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Send email to users when they are added to or removed from a project group

Specifies whether to send an email to team members when they are added to or removed from a project group.

ID	`Application.ACM.SendNotificationOnTeamAssignmentChange`
Name	**Send email to users when they are added to or removed from a project group**
Default value	**Yes**

To suppress notifications sent when a team member is added to or removed from a project team group, you can set the `Application.ACM.SendNotificationOnTeamAssignmentChange` parameter to **No**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Self-Service Site Configuration Parameters for Project Teams

Keep team membership capabilities after removal from subproject

Specifies if members of a subproject inherited from the parent project retain team membership capabilities in the subproject if they are removed from the subproject.

ID	`Application.ACM.InheritTeam.ParentProjectTeamIsConsideredSubprojectTeam`
Name	**Keep team membership capabilities after removal from subproject**
Default value	**Yes**

By default, a user inherited as a team member in a subproject from the parent project but later removed from the subproject retains team membership capabilities in the subproject. If the user had Project Owner capabilities in the subproject, these capabilities are also retained. To disable this behavior, set this parameter to **No**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Self-Service Site Configuration Parameters for Contract Documents

Allow publication of subagreements with later expiration than master agreement

Specifies whether to allow the publishing of a subagreement with an expiration date that is later than the expiration date of the corresponding master agreement.

ID	`Application.ACM.AllowFutureExpirationDateInSubAgreements`
Name	**Allow publication of subagreements with later expiration than master agreement**
Default value	**No**

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Self-Service Site Configuration Parameters for Contract Line Items Documents

`Application.ACM.ContractLineItemsDocument.Enabled` (set by SAP Ariba Support)
Specifies if contract line items documents are enabled. The default value is `No`.

Self-Service Site Configuration Parameters for All Task Types

Let users submit tasks on unedited documents

Specifies if users can submit tasks for unedited documents. By default, a document cannot be in the **Not Edited** state when a task is submitted; the project owner must open or publish the document before submitting the task.

ID	`Application.ACM.TasksAllowSubmissionOfUneditedDocuments`
Name	**Let users submit tasks on unedited documents**
Default value	**No**

To allow users to submit tasks for unedited documents, set this parameter to **Yes**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Self-Service Site Configuration Parameters for Review Tasks

Include documents in notifications sent to online reviewers

Specifies whether notifications for review and negotiation tasks sent to online reviewers include the document for the task. Online reviewers are users with an SAP Ariba buyer sign in, not external reviewers or email reviewers (business contacts). If this parameter is set to **No**, the document for the review and negotiation tasks is included only in notifications sent to email reviewers.

ID	`Application.ACM.SendEmailAttachmentToInternalReviewer`
Name	**Include documents in notifications sent to online reviewers**
Default value	**No**

> **Note**
>
> If email approvals are enabled for your site (the site configuration parameter `Application.Base.EmailApprovalEnabled` is set to `Yes`), documents linked to tasks are always included in the email notifications sent to reviewers.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Include system reference URL in notifications to email reviewers

Specifies if notifications sent to email reviewers include a system reference URL.

ID	`Application.ACM.IncludeSystemReferenceFooterForEmailReviewers`
Name	**Include system reference URL in notifications to email reviewers**
Default value	**Yes**

By default, SAP Ariba includes a System Reference URL link to the task at the bottom of the email notifications sent to external reviewers. Because external reviewers do not have access to SAP Ariba, nothing happens if reviewers click it. If this URL link is included in the reply to the task owner, the task owner can use it to access the system.

To suppress System Reference links in email notifications set to external reviewers, set this parameter to **No**.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Site Configuration Options for Review Tasks

Application.ACM.IncludeSystemReferenceFooterForEmailReviewers

By default, SAP Ariba includes a System Reference link to the task at the bottom of the email notifications sent to an external reviewer. Because external reviewers do not have access to SAP Ariba, nothing happens if reviewers click it. If this reference is included in the reply to the task owner, the task owner can use it to access the system.

System Reference links are not sent in email notifications set to external reviewers if the parameter `Application.ACM.IncludeSystemReferenceFooterForEmailReviewers` is disabled.

Application.ACM.EnableAutoUpdateTaskOwner

When `Application.ACM.EnableAutoUpdateTaskOwner` parameter is set to **Yes**, the user who submits a task is automatically assigned as the task owner if the task has no individual user assigned as the task owner.

Related Information

Automatically update the task owner if no individual owner is assigned

Site Configuration Options for Approval Tasks

Application.ACM.ApprovalFilterRules

Specifies whether approval filter rules are available or not. If this parameter is set to true, filter rules can be created, enabled, or edited for approval flows.

Site Configuration Options for Signature Tasks

Application.ACM.Signature.DocuSignREST.SupportsFolders

Specifies if users can create a signature task for all top-level documents in a folder (documents not in subfolders) when using DocuSign as a signature provider. The default value is `Yes`.

Application.ACM.Signature.EchoSign.SupportsFolders

Specifies if users can create a signature task for all top-level documents in a folder (documents not in subfolders) when using Adobe Sign as a signature provider. The default value is `Yes`.

Application.ACM.Signature.SignatureTaskRefreshInterval

This parameter determines how frequently Ariba requests signature status information from the electronic signature provider. The default value of refresh interval is 120 minutes and minimum value is 30 minutes. Contact SAP Ariba Support if you want to change the value.

Site Configuration Options for Notification Tasks

Application.ACM.OverdueNotifyTaskReminderBegin

This parameter specifies the number of days to elapse after a notification task is due before the first overdue notification is sent to the task recipient. The default is 7.

Application.ACM.OverdueNotifyTaskReminderFrequency

This parameter specifies how often overdue notifications are sent for overdue notification tasks, in days. The default is 2.

Application.ACM.SendEmailAttachmentToNotificationRecipient

If set to `Yes` and a notification task is associated with a document, SAP Ariba includes a copy of the document in email notifications sent to internal users (recipients with an SAP Ariba user account). Note that the document is not sent to external users (business contacts and email reviewers).

Site Configuration Options for Phases

Application.ACM.PhaseAutoStart

By default, a phase automatically starts when one of its tasks is marked Started or Complete. If `Application.ACM.PhaseAutoStart` is set to `No`, users must manually mark a phase Started.

Application.ACM.PhaseAutoComplete

By default, a phase automatically completes when all of its required tasks are completed. If `Application.ACM.PhaseAutoComplete` is set to `No`, users must manually mark a phase Complete.

Site Configuration Options for Predecessor Tasks

Application.ACM.NotificationTasks.EnableTaskCanBeStartedNotificationForSuccessorTask

By default, no Task Can Be Started email notification is sent if a task can be started if its predecessor task is completed and the predecessor task is a notification task. Setting the `Application.ACM.NotificationTasks.EnableTaskCanBeStartedNotificationForSuccessorTask` to true causes a Task Can Be Started email notification to be sent even if the completed predecessor task is a notification task.

SAP Ariba Contracts and SAP Fieldglass Integration

Description

Users of SAP Ariba Contracts can use the workflow integration between SAP Ariba Contracts and SAP Fieldglass such that their contract management and service procurement process is done in SAP Fieldglass while the contract workspace and contract terms creation occurs in the SAP Ariba Contracts solution.

Order information flows between SAP Fieldglass and the SAP Ariba Contracts solution.SAP Ariba Contracts users can upload contracts and have SAP Fieldglass manage the associated work orders and statements of work (SOWs). Additionally, the tight integration between SAP Fieldglass and SAP Ariba Buying allows SAP Ariba requisition approvers to easily access associated SAP Fieldglass work orders and statements of work (SOWs) directly from the requisition. Relevant invoicing and payment information flows between the solutions via SAP Business Network.

For information about the integration steps to be performed in SAP Fieldglass, see SAP Fieldglass and SAP Ariba Contract Integration in the SAP Fieldglass Integration documentation.

Prerequisites

The Standard Ariba Contract Upload connector must be enabled in SAP Fieldglass.

Web Services must be enabled in SAP Ariba and SAP Fieldglass.

The `Application.ACM.EnableWSContractTermsPush` parameter, the `Application.ACM.EnableWSWorkspaceIdOnPublishPush` parameter, and the Download Contract Terms webservice must be enabled.

SAP Fieldglass sends information to SAP Ariba solutions through a web service integration event using Simple Object Access Protocol (SOAP) documents. The documents include supplier ID information for each line item. The supplier IDs are used to find matching suppliers in the SAP Ariba solution. Typically, the supplier's SAP Business Network ID is used for this purpose. In the SOAP document, this ID is in the **SupplierANId** field, so this field must be configured.

The contract terms must be created. SAP Fieldglass receives a base-64 encoded ZIP file containing the Contract Terms file in CSV format.

To use the integration between SAP Ariba Contracts and SAP Fieldglass, you must have at least one line item in your contract workspace. In your contract workspace, navigate to the **Document** section and select **Actions** > **Create** > **Line item document**, create an item inside it with a commodity and save it as a draft, create a Contract Term, and then publish the line item document and the contract term.

The contract header terms must be created.

The Supplier ANID must be enabled.

Restrictions

The following considerations apply to importing SAP Ariba Contracts into SAP Fieldglass:

- Collaborative efforts that need SAP Fieldglass support are exported to SAP Fieldglass.
- New supplier master agreements will exist in SAP Ariba Contracts.
- Release (Planned) and No Release (Unplanned) contracts are both supported. However, the CRID and CID are only distributed when the released contract is available.
- Only single line services are supported. Hierarchical services are not supported.
- Only amendments of type renewals, terminations, and amendments are supported.

Information Flow Between SAP Fieldglass and SAP Ariba Contracts

See Information Flow Between SAP Fieldglass and SAP Ariba Contracts [page 447]

Information for Administrators

- Web Services Integration Tasks for SAP Fieldglass Contracts Data Integration [page 448]
- Configuring SAP Ariba Web Services for Integrating SAP Ariba Contracts with SAP Fieldglass [page 449]
- Site Configuration Parameters for SAP Fieldglass Contracts Data Integration [page 451]

Information for Users

- Setting Up the Contract Details in SAP Ariba Contracts and SAP Fieldglass [page 451]

Information Flow Between SAP Fieldglass and SAP Ariba Contracts

The end-to-end flow of information between SAP Fieldglass, SAP Ariba Contracts, SAP Ariba Buying, and SAP Business Network begins with the creation of the contract workspace and contract terms in SAP Ariba Contracts and ends with the passing of invoices reconciled against the corresponding purchase orders from SAP Business Network to SAP Ariba Contracts.

The following steps explain the end-to-end flow of information between SAP Fieldglass, SAP Ariba Contracts, SAP Ariba Buying, and SAP Business Network in detail:

1. In SAP Ariba Contracts, a contracts user creates a contract workspace and contract terms.
2. The contracts user publishes the contract terms. The Contracts Line Item Excel and webservice exports to SAP Fieldglass include the contract IDs from the operational procurement system.

3. The **Download Contract Header Fields** webservice is used to parse the custom contract header fields to determine whether SAP Fieldglass can service the contract. If the custom field configuration contains the value of Fieldglass Services Contract, then SAP Fieldglass can service the contract.
4. If the custom contract header fields indicate that SAP Fieldglass can service the contract, the contracts user uses the **Download Contract Terms** webservice to retrieve contract details from SAP Fieldglass.
5. The SOW is created in SAP Fieldglass and follows approval routing to the supplier.
6. The work order or SOW progresses through the approval flow, eventually being routed to the SAP Ariba solution. At this point, information from the submitted work order or SOW is passed from SAP Fieldglass to theSAP Ariba Buying solution (via a web services integration task) for financial approval.
   A comment in the work order or SOW states that it was sent for external approval.
7. The SAP Ariba Buying solution uses the work order or SOW information to create a high-level, non-catalog requisition, marks the requisition as a services requisition from SAP Fieldglass, and submits it for approval. The requisition requester is the user who created the work order or SOW in SAP Fieldglass.
8. After the requisition goes through the approval flow, SAP Fieldglass creates the purchase order.
9. After the invoice items are completed, SAP Fieldglass sends the invoice to SAP Business Network as an ERP copy invoice. The invoice on SAP Business Network is not editable.
10. SAP Business Network matches the invoice to the PO using the PO ID and sends the invoice to the SAP Ariba Buying solution.
11. The SAP Ariba Procurement solution receives the ERP invoice copy, which is automatically approved with no approval workflow and is not editable. The status of the invoice is Reconciled.
12. SAP Business Network sends the reconciled invoice to SAP Ariba Contracts.

Information for Administrators

Web Services Integration Tasks for SAP Fieldglass Contracts Data Integration

Web services integration tasks pass data between SAP Fieldglass and SAP Ariba Contracts.

- The **Export Workspace ID** service is a real-time integration that pushes the CWID (contract ID) to SAP Fieldglass when it is published in SAP Ariba Contracts.
- Use the SAP Ariba interface to create a contract workspace, then push contract header information to your back-end system for processing. Use the **Export WorkspaceId** web service to receive the IDs of workspaces as they are created, then use the **Download Contract Header Fields** web service to pull contract header fields of the created workspaces to your back-end system.
  If you have SAP Ariba Sourcing and SAP Ariba Contracts you can create a contract.
- You must create a custom field called Contract Type and set its value to `Fieldglass`.
- Use the **Download Contract Header Fields** web service to download header field values for one or more contract workspaces. The **Download Contract Header Fields** web service receives **ContractHeaderExportRequest** messages and responds with **ContractHeaderExportReply** messages.
  A **ContractHeaderExportRequest** message must specify the class (type) of contract workspace for which header fields will be exported.

- You can use the **Export WorkspaceId** web service with the **Download Contract Header Fields** web service to pull contract header field values as contract workspaces are created or published. For example, use the **Export WorkspaceId** to automatically send a contract workspace ID to a SOAP peer when a contract is created or published in SAP Ariba Contracts. The SOAP peer sends a **Download Contract Header Fields** request with the workspace ID received in the **Export WorkspaceId** request to get the contract header field values.
  Alternatively, you can periodically send **Download Contract Header Fields** with a date range to get contract header field values of contract workspaces that have been modified during the specified date range.
- If you have defined custom header fields (flex fields), and you want them exported, verify with your SAP Ariba representative that they are flagged for export on the **Advanced** tab of the Field Configurator.
- The **Download Contract Terms** web service is the callback integration that will retrieve the Request Contract Terms CSV detail based on the CWID received.
  Use the **Download Contract Terms** web service to download the Contract Terms document. This document is integrated with SAP Ariba Procurement and Invoice Solutions. The document provides pricing terms generated from the sourcing object.
  The **Download Contract Terms** web service receives the **ContractTermsDownloadsRequest** messages and returns the **ContractTermsDownloadReply** responses.
  SAP Fieldglass will receive a base-64 encoded ZIP file containing the Contract Terms file in CSV format.
- The **SAP Fieldglass Ariba Contract Upload** imports SAP Ariba contract data to the SAP Fieldglass Master SOW upon receipt.
  This connector is the response upload that will process the retrieved Contract Terms CSV file from SAP Ariba. Uploads function in two steps:
- Create SOW Shell – The integration will use the SAP Fieldglass standard SOW Shell Upload as a base to allow for the master SOW to be created.
- Create Line Items – The integration will use the Upload Event or Upload Fee, depending on the line item type.
  For error handling, all files are processed even if the first file fails. Files can be downloaded from the integration audit trail for reprocessing, if required. Email notification is available on failed contract loads.
  SAP Fieldglass will create a generic Ariba Contract Master SOW template that will default on every import. The definition of the template must be reviewed and agreed upon by each customer.
  The data is received in base-64 encoded format and transposed into CSV upload format.

Configuring SAP Ariba Web Services for Integrating SAP Ariba Contracts with SAP Fieldglass

Use this procedure to configure SAP Ariba Web Services for integrating SAP Ariba Contracts with SAP Fieldglass.

Context

Ariba Administrator consists of a collection of workspaces. Each workspace includes a set of related tasks used to administer SAP Ariba solutions. For information about how to create endpoints that can be associated with integration events and about how to enable and disable integration events, see SOAP Web Service API Integration Guide.

You must be a member of a group that can access Ariba Administrator. (If you're not a member of such a group, you won't see the Administration option on the Manage menu.) Once you're in Ariba Administrator, the options you can see depend on the groups you belong to.

Procedure

1. Sign in to your site using your administrator user name and password.
2. On the dashboard, choose **Manage** > **Administration**.
3. Click **Integration Manager** > **End Point Configuration**, and then click **Create New**.
4. Create an inbound endpoint with the name Fieldglass Contract Inbound, type Inbound, and credentials that will be used in the SAP Fieldglass endpoint configuration.
5. Create an outbound endpoint with the name Fieldglass Contract Outbound, type Outbound, and credentials that will be used in the SAP Fieldglass endpoint configuration.
6. In **Manage** > **Administration**, click **Integration Manager** > **Integration Configuration**.
7. Use the Download Contract Header Fields web service to download header field values for one or more contract workspaces. Provide the status Enabled, format Web Service, endpoint Fieldglass Contract Inbound, and the URL that will be used in the SAP Fieldglass endpoint configuration.

   The Download Contract Header Fields web service receives ContractHeaderExportRequest messages and responds with ContractHeaderExportReply messages.
8. Use the Download Contract Terms web service to download the Contract Terms document. Provide the status Enabled, format Web Service, endpoint Fieldglass Contract Inbound, and the URL that will be used in the SAP Fieldglass endpoint configuration.

   The Download Contract Terms web service is the callback integration that will retrieve the Request Contract Terms CSV details based on the CWID received.

   The contract terms document is integrated with SAP Ariba Procurement and Invoice Solutions. The document provides pricing terms generated from the sourcing object.

   The Download Contract Terms web service receives the ContractTermsDownloadsRequest messages and returns the ContractTermsDownloadReply responses.
9. Use the Export WorkspaceId web service with the Download Contract Header Fields web service to pull contract header field values as contract workspaces are created or published. Provide the status Enabled, format Web Service, endpoint Fieldglass Contract Outbound, and the URL that will be used in the SAP Fieldglass endpoint configuration.

   For example, use the Export WorkspaceId to automatically send a contract workspace ID to a SOAP peer when a contract is created or published in SAP Ariba Contracts. The SOAP peer sends a Download Contract Header Fields request with the workspace ID received in the Export WorkspaceId request to get the contract header field values.
10. In **Manage** > **Administration**, click **Customization Manager** > **Parameters**, and set the `Application.ACM.EnableWSWorkspaceIDOnPublishPush` parameter to Yes.
11. Create and add the custom field, Contract_Type, to the Contract Workspace (Procurement). Ensure that the parameter, External Integration Field, is checked for this custom field.
12. Add the custom field, Contract_Type, to the Download Contract Header Fields integration with the column name cus_Contract_Type. To do so, in **Manage** > **Administration**, **Integration Manager** > **Data Definition**, navigate to **Export Procurement Contracts Header Data** > **Actions** > **Review**, ensure that cus_Contract_Type appears as a new field in this integration, and click the Accept Changed Fields button.
    If the value Fieldglass is not passed in this field in the Download Contract Header Fields integration, SAP Fieldglass will not process the contract. The field name and value can be configured in SAP Fieldglass (contractTypeColumn: contractTypeValue).

13. Ensure that the supplier ANID is in the Download Contract Terms integration. The integration searches for the following Domains, in this order: networkid, transactionnetworkid, and sap. If the integration does not find one of these three domains that contain the ANID, then the integration will fail and SAP Fieldglass will not process the contract.
14. Add the networkId or another Domain to the supplier being used. To do so, navigate to **Manage > Core Administration > Supplier Manager > Suppliers**, and search for and find the desired supplier record you want to edit. Click **Actions > Edit**, and at the common supplier level, click the Organization IDs tab, and click Create New. Select a new domain and then provide the ANID for the domain's value. Navigate to the Partitioned Suppliers tab and then click Edit the partition supplier record. Click the Organization IDs tab and then click Create New. Select the new domain and then provide the ANID for the domain’s value. Click OK and then click Save.

Site Configuration Parameters for SAP Fieldglass Contracts Data Integration

Some of the functionality for SAP Fieldglass integration with SAP Ariba Contracts is controlled by site configuration options, or parameters, which SAP Ariba sets.

`Application.ACM.EnableWSWorkspaceIDOnPublishPush`

In SAP Ariba Contracts integrated with SAP Fieldglass, this parameter specifies the URL of the endpoint for sending the workspace ID to SAP Fieldglass. Create the SAP Fieldglass end point in SAP Ariba Contracts Administrator Section. The SAP Fieldglass end point must be configured to export the Workspace ID. Use the SAP Fieldglass end point, along with the user name or license key credentials.

Information for Users

Setting Up the Contract Details in SAP Ariba Contracts and SAP Fieldglass

Use this procedure to set up the contract details in SAP Ariba Contracts and SAP Fieldglass.

Context

When SAP Ariba Contracts is integrated with SAP Fieldglass, contract details from SAP Ariba Contracts are sent to SAP Fieldglass. To send contract details to SAP Fieldglass, create a contract workspace in SAP Ariba Contracts and add a contract line item document and a contract terms document to the workspace. When you publish the contract line item document and the contract terms document, the contract details including the contract ID, metadata, and contract terms are sent to SAP Fieldglass.

Procedure

1. Create a contract workspace in SAP Ariba Contracts. You must ensure that the supplier exists in both SAP Ariba and SAP Fieldglass.
2. In the Contract Amount field, specify the contract amount.
3. Create a custom term, Contract_Type, and set its value to **Fieldglass**.
4. Create a line items document within the contract workspace in SAP Ariba Contracts with the items to be passed from SAP Ariba to SAP Fieldglass. For example, specify the name, price, and quantity, for the line items.

   These details appear as catalog rate definitions in the Master SOW in SAP Fieldglass.
5. Create a contract terms document in SAP Ariba Contracts. For information about how to create the contract terms document, see Managing Contract Spending from Contract Workspaces.
6. In the Definitions section, provide definitions for the following fields.
   a. For Contract Type, choose Supplier Level.
   b. For Company Code, choose the company code.
   c. For Purch Org, choose the purchasing organization code.
   d. For Do non-catalog items accumulate against contract?, choose Yes.
7. In the Limits section, for the Maximum Limit field, provide the contract amount.
8. Publish the line items document and the contract terms document.

   The information from SAP Ariba Contracts, such as the ID, metadata, and terms, is passed to SAP Fieldglass. For example, the contract amount appears in the Maximum Budget field. A Master SOW in is created in SAP Fieldglass in draft status. The line Items from SAP Ariba Contracts are received as Catalog Rate Definitions within the SAP Fieldglass Master SOW. Child SOWs created from the Master SOW also inherit the rates, budgets and other attributes from the original SAP Ariba Contracts workspace.

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