SAP Ariba

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Event Management Guide

SAP Ariba Sourcing
SAP Strategic Sourcing Suite
SAP Ariba Start Sourcing

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Content

Event Management Guide

This guide is for SAP Ariba users who create, manage, and award SAP Ariba Sourcing events.

Buyers create sourcing events to collect business and pricing information from suppliers. Read this guide if you're a procurement professional who:

- Creates Request for Information (RFI) events to explore solutions to procurement needs.
- Creates Request for Proposal (RFP) events and auctions to solicit pricing and other information from suppliers.
- Monitors RFIs, RFPs, and auctions to see the supplier responses you've received.
- Evaluates responses, then awards event items to suppliers.
- Customizes automatic event notification templates.
- Creates and edits event templates.

This guide applies to:

- SAP Ariba Sourcing
- SAP Ariba Strategic Sourcing Suite

Related Guides

Event Rules Reference Guide

RFQ and Award Integration with SAP Ariba Sourcing

Grading and Scoring

Using Conditions in Events, Surveys, and the Supplier Profile Questionnaire

Project Template Guide

Managing Projects, Teams, Documents, and Tasks

Workflow for Setting Up Guided Sourcing

Managing Events with Guided Sourcing

SAP Ariba Sourcing Event Checklist

In SAP Ariba Sourcing, an “Event” is the publication of data to suppliers or buyers and their response to questions or bids on goods or services. It includes requests for information, or proposals, as well as forward and reverse auctions. Here is a check list for getting started quickly:

	Task	Procedure
☐	Determining the event type	Refer to SAP Ariba Sourcing Event Types [page 15] for an overview of event types and the templates available for each type.
☐	Creating the event	• On the dashboard, click **Create** > **Sourcing Project**. • For fast results, copy from a similar project. Choose a project to copy from the **Copy from Project** pull-down menu. • Complete the event details and click **Create**. For more information on creating an event, see Creating SAP Ariba Sourcing Events [page 32].
☐	Defining the event rules	The rules in your project depend on the event type and the template you selected. The templates provide a good starting point, so all you need to do is fill in certain values. For more information about event rules, see Event Rules Reference Guide.
☐	Selecting team members	By default you are the project owner and members of certain system groups are already included by default. You can add other project owners and observers from the Team page. For more information, see Adding Team Members to Event Project Groups [page 47].
☐	Inviting participants	From the Supplier or Participants page you can invite suppliers/participants. For more information, see Inviting Existing Suppliers to Events [page 57].
☐	Creating event content	Go to the Content page to add questions, requirements, the items and lots that you plan to buy or sell and all the cost or other terms required. You can copy some or all of the content from another event, to simplify this complex step. You can also copy individual items from other events and drag and drop them to the Content page. For more information, see Creating Event Content [page 76].
☐	Publishing your event	To publish your event, click **Publish**. Your administrators may have set up an approval process. If so, all the appropriate team members and approvers are notified. For more information, see Reviewing and Publishing Events [page 282].
☐	Monitoring your event	Find the event on the Home dashboard or search for it and click its name, and choose **Monitor** or **View Details**. You see the event's monitoring interface. You can use the event monitoring interface to do the following: • Pause and resume the event. • Extend or reduce timing of the event. • Cancel and close the event. • Edit a running event. For more information, see Editing and Monitoring Events [page 421].

	Task	Procedure
☐	Award the event	In the event monitoring interface you can create one or more award scenarios on the **Scenario** tab and then choose one for your award on the **Award** tab. For more information, see Event Scenario Tab [page 473] and Event Award Tab [page 474].

Related Information

SAP Ariba Sourcing Event Types [page 15]
Adding Event Team Members and Project Groups [page 45]
Inviting Event Participants [page 52]
Creating Event Content [page 76]
Event Formulas [page 142]
Working with Event Types [page 184]
Creating Postings on SAP Business Network Discovery [page 255]
Creating International Events [page 271]
Reviewing and Publishing Events [page 282]
Editing and Monitoring Events [page 421]
Working with Automatic Event Notifications [page 295]
Awarding Events [page 316]
Creating Sourcing Event Data Using Excel [page 373]
Using Custom Offline Response Sheets [page 413]
Creating Event Templates [page 488]

SAP Ariba Sourcing Event Types

About Request for Information (RFI) Events

Use a Request for Information (RFI) to send questions to participants, gather participant feedback, and qualify participants based on their responses.

RFIs generally contain questions to gather non-competitive data, information, comments, or reactions from potential participants. RFI typically do not solicit pricing information. Instead, RFIs usually precede other events (RFPs or auctions) that include price.

RFI events are not competitive, and participant responses are never shown to other participants. Because RFIs are not competitive, they may be open for responses for an arbitrary amount of time (several days or weeks), allowing participants to sign in and respond at their convenience.

If your RFI contains many questions or if you invite many participants, it may be difficult to interpret all the information that you collect. The grading and scoring feature can help you rate participants' responses. This feature lets you weigh and grade participant responses, and create an overall score for each participant.

An RFI can be used alone to solicit proposals from participants. You can award business based on the results of an RFI. An RFI can also be used as the qualifying round of a longer sourcing process. In the RFI step, you collect information about participants for the purpose of selecting a few of them to invite to follow-on events such as RFPs or auctions. You can reuse the information from an RFI in another, follow-on event.

RFI Templates

SAP Ariba provides the following templates for RFI events:

- **Request for Information** (classic sourcing)
- **Request for Information - Guided Sourcing Template** (available if guided sourcing is enabled)

When you use either of these templates to create an RFI, the scoring feature is enabled. Participant responses are not shown to other participants and there is no option to show participant responses to other participants.

Related Information

Content for Multi-Stage Projects [page 165]

About Request for Proposal (RFP) Events

RFPs generally specify items that you want to collect pricing information, such as goods and services. Like Requests for Information (RFI) events, RFPs can include questions to qualify participants.

An RFP communicates business needs to potential participants and asks them to propose goods or services to fulfill the business needs. The participant typically includes pricing information in the response, but price might not be the most important factor in your selection.

Although you can configure a factor in responses, such as **Price**, as the basis for evaluating and ranking responses, RFPs are not directly competitive. There is no real-time exchange of information between competing participants, and participant responses are never shown to other participants. Therefore, RFPs can be open for responses for an arbitrary amount of time (several days or weeks), allowing participants to sign in and respond at their convenience.

If your RFP contains many questions, use the grading and scoring feature, which allows you to rate the importance of questions and pricing and grade participants' answers to create a final score for each participant.

An RFP is generally thought of as the second step of a longer sourcing process. In the RFP step, you gather more detailed information about participants. For example, you can determine exactly which goods or services suppliers offer, and collect information about their production capacity, as well as their prices. You can use this information to set up a follow-on auction, determine which lots you invite them to, and intelligently set up their ceiling prices.

Large-Capacity RFPs

If you want to solicit pricing or other information for a large number of items (more than 2,000 items), you can create a large-capacity RFP. Large-capacity RFPs are non-competitive RFPs that can contain up to 10,000 line items. Large-capacity RFPs are supported only in classic sourcing RFPs. The contents for large-capacity RFPs are accessed using Excel spreadsheets and are not directly visible in the user interface. For more information about large-capacity RFPs, see Using Large-Capacity RFPs [page 508].

RFP Templates

SAP Ariba provides the following templates for RFP events:

- **Request for Proposal**
  Request for Proposal - Guided Sourcing Template (available if guided sourcing is enabled)
  These templates enable you to create an RFP that includes a questionnaire with sections, questions, requirements, and line items to collect pricing information, or qualify participants, possibly for an auction.
- **Request for Proposal with Price Breakdown**
  Enables you to create an RFP that, instead of soliciting a single price per unit from participants, collects component values (such as materials and labor) of per-unit prices.
- **Request for Proposal with Total Cost**
  Request for Proposal with Total Cost - Guided Sourcing Template (available if guided sourcing is enabled)
  Enables you to create an RFP that allows the project owner to add additional cost factors, such as Shipping Fees, to calculate a total cost for each item or lot.
  Suppliers submit a **Price** (per unit), and a **Total Cost** is calculated using the **Price**, **Quantity** and factors you configure as cost terms. Cost terms can be added, subtracted, multiplied, or applied as a discount for each unit in a line item or collectively to a line item (not multiplied by the **Quantity**), so **Total Cost** calculations can be more complex than price breakdown calculations.

About Auctions

An auction is a real–time online event during which participants submit competitive bids for specific goods or services.

Most SAP Ariba auctions are **reverse auctions**, in which you are buying items and suppliers submit bids. (SAP Ariba also supports forward auctions, in which you are selling items, such as excess inventory).

Since auctions require a lot of preparation to be successful, sourcing professionals typically prepare for them by running qualifying information-collecting events (RFIs and RFPs).

You can configure event rules to control what market feedback is shown to participants. Market feedback is information about how a participant's prices compare with other participants' prices.

Auctions are directly competitive and allow the real-time exchange of information between participants. You must carefully schedule your auctions so that all participants can participate at the same time. Train the invited participants in advance so that they are comfortable using the SAP Ariba Sourcing interface. On bid day, participants sign in to SAP Ariba Sourcing and submit bids. Optionally, a real-time graph shows them how they compare to other participants. You, or someone in your organization, administers the auction, changing the timing of lots, deleting erroneous bids, and responding to participants' questions.

About Reverse Auctions (English Reverse Auctions)

In a reverse auction, or English reverse auction, suppliers submit bids, offering progressively lower prices in an effort to outdo their competition and offer you the best price.

In a typical scenario for a reverse auction, your business may know of several participants that are capable of providing, at competitive prices, the specific goods or services that it wants to purchase.

You can use a reverse auction to bring the participants into competition for your business. Create line items for everything that you want to buy. You can group line items into lots to create a package of goods or services to bid on. Specify ceiling and reserve prices, timing rules, and other strategic rules, to maximize competition.

SAP Ariba provides the following templates for English reverse auctions:

- **Reverse Auction** (classic sourcing)
  Reverse Auction - Guided Sourcing Template (available if guided sourcing is enabled)
- **Total Cost Auction** (classic sourcing)
  Total Cost Auction - Guided Sourcing Template (available if guided sourcing is enabled)
  Enables you to create an event that allows the project owner to define additional cost factors, such as Shipping Fees, to calculate a total cost for each item or lot.
- **Reverse Auction with Bid Transformation** (classic sourcing)
  Reverse Auction with Bid Transformation - Guided Sourcing Template
  Enables you to create an event that allows the project owner to "transform" participant bids by defining additional cost factors (similar to total cost events, except that only one cost factor is visible to participants).

SAP Ariba also provides templates for reverse Dutch and reverse Japanese auctions.

About Forward Auctions

In a forward auction, you want to sell rather than buy items. Instead of inviting suppliers to compete to offer you the lowest cost, you invite buyers to compete to offer you the highest price.

In an example scenario for a forward auction, your company may have extra inventory that you want to liquidate, and you know of several parties who are interested in purchasing it.

You can use a forward auction to bring the parties into direct competition for your goods. Create line items for each specific item you want to sell. You can group line items into lots to create a package of goods or services for buyers to bid on. Specify ceiling and reserve prices, timing rules, and other strategic rules, to maximize competition.

SAP Ariba provides the following templates for forward auctions:

- **Forward Auction** (classic sourcing)
- **Forward Auction - Guided Sourcing Template** (available if guided sourcing is enabled)
- **Forward Auction with Bid Transformation** (classic sourcing)
  Enables you to create an event that allows the project owner to "transform" participant bids by defining additional cost factors; only one cost factor is visible to participants.
- **Forward Auction with Bid Transformation - Guided Sourcing Template** (available if guided sourcing is enabled)

SAP Ariba also provides templates for forward Dutch and forward Japanese auctions.

Dutch and Japanese forward auction types in **Guided Sourcing** do not support **out-of-the-box (OOTB)** award scenarios.

About Dutch Auctions

In a Dutch auction, prices automatically rise (for reverse auctions) or fall (for forward auctions) over time.

SAP Ariba supports reverse Dutch auctions and forward Dutch auctions. In reverse Dutch auctions, you are the buyer; you set an initial price and the price automatically rises periodically until a supplier accepts the price or a predetermined target price is reached. Suppliers are motivated to accept the listed price as soon as they can or risk losing the business altogether.

In forward Dutch auctions, you are the seller; you set an initial price and the price automatically drops periodically until a buyer accepts the price or a predetermined target price is reached.

SAP Ariba provides the following templates for Dutch auctions:

- **Dutch Reverse Auction** (classic sourcing)
  Dutch Reverse Auction - Guided Sourcing Template (available if guided sourcing is enabled)
- **Dutch Reverse Auction with Bid Transformation** (classic sourcing)
  Dutch Reverse Auction with Bid Transformation - Guided Sourcing Template (available if guided sourcing is enabled)
  Enables you to create an event that allows the project owner to "transform" participant bids by defining additional cost factors; only one cost factor is visible to participants.
- **Dutch Forward Auction** (classic sourcing)
- **Dutch Forward Auction - Guided Sourcing Template** (available if guided sourcing is enabled)
- **Dutch Forward Auction with Bid Transformation**
  Dutch Forward Auction with Bid Transformation - Guided Sourcing Template (available if guided sourcing is enabled)

Related Information

Creating Dutch Auctions [page 218]

About Japanese Auctions

Japanese auctions require participants to accept pricing at levels that automatically adjust at regular intervals.

You use this auction type to create a Japanese-style competitive bidding event for line items or lots. Japanese auctions require suppliers to accept pricing at levels that automatically adjust at regular intervals.

In a reverse Japanese auction, you are buying and the price level falls at each configured interval; in a forward Japanese auction, you are selling and the price level rises at each interval. Participants choose to accept price levels as they drop (or rise). By default, a participant who does not accept a price level for an item becomes inactive and is unable to accept any further price levels for the item.

Bidding ends for an item when either of the following occurs:

- The number of active participants drops to or below the configured minimum value.

- The target price is reached.

An SAP Ariba Customer Support representative must run a scheduled task to install Japanese auction templates. To install Japanese auction templates, have your Designated Support Contact log a service request. The scheduled task creates the following templates for Japanese auctions:

- **Japanese Reverse Auction** (classic sourcing)
  If guided sourcing is enabled, you can create a copy of it for guided sourcing. Copy it, click **Edit Properties**, and set the **Guided Sourcing Template** property to **Yes**.
- **Japanese Reverse Auction with Bid Transformation - Guided Sourcing Template** (available if guided sourcing is enabled
- **Japanese Forward Auction** (classic sourcing)
- **Japanese Forward Auction with Bid Transformation** (classic sourcing)

Related Information

Japanese Auction Characteristics [page 237]
Creating Japanese Auctions [page 238]

About Index Auctions (Index Auction by Amount and Index Auction by Percentage)

If you are sourcing a commodity product that is subject to frequent price fluctuations, use an index auction to cause participants to bid in discounts or premiums relative to a market index.

There are two templates: one causes participants to bid in a currency amount added or subtracted from the index; the other causes participants to bid in a percentage value added or subtracted from the index.

SAP Ariba provides the following templates for index auctions:

- **Index Based Auction by Amount**
  Participants bid in a currency amount added or subtracted from the index price.
- **Index Based Auction by Percentage**
  Participants bid in a percentage value added or subtracted from the index price.

Related Information

About Event Index Auctions [page 212]

Event Options

SAP Ariba supports the following event options.

Options for Evaluating Responses

SAP Ariba provides the following options that enable you to consider factors in addition to **Price** when evaluating event responses, and to weigh and adjust the values of participant responses.

Option	Description	Additional Information
Total cost	Total cost events enable you to include additional cost factors when evaluating responses. In most total cost events, suppliers submit a **Price** (per unit), and a **Total Cost** per item is calculated using the **Price**, **Quantity**, and factors you configure as cost components, such as shipping. Cost components can be added, subtracted, multiplied, or applied as a discount for each unit in a line item or collectively to all units in a line item (not multiplied by the **Quantity**). You can also configure cost components to be provided by the suppliers during the event, whether you want suppliers to see only their own rank, their own rank and the lead bid, or all supplier responses. Supplier ranks are based on the unit cost. Suppliers see their total cost and unit cost and any cost components that you made visible for them. SAP Ariba provides RFP and auction templates with total cost capabilities. Because RFI events are not intended for collecting pricing information, SAP Ariba does not provide RFI templates with total cost capabilities.	Event Total Cost Formulas [page 199] Setting Up Total Cost Auctions or RFPs [page 207]

Option	Description	Additional Information
Bid transformation	Bid transformation events are similar to total cost events; you configure cost components included in **Total Cost**calculations. However, in bid transformation events only one cost component is visible to participants, so participants can submit values for only one cost component; all other cost components are not visible to participants. You can configure participant-specific values for cost components. For example, you may include a transition cost only for suppliers that you haven't worked with previously. Although participants cannot see all cost components, each participant can see a "bid to beat" that is adjusted for them. SAP Ariba provides RFP and auction templates with bid transformation capabilities. Because RFI events are not intended for collecting pricing information, SAP Ariba does not provide RFI templates with bid transformation capabilities.	Bid Transformation Auctions [page 184]
Grading and scoring	Scoring enables you to assign numeric values (weights) to items, lots, and questions in events based on their importance to you. For example, if the response to a particular question is more important to you than other questions, you can assign a larger weight to that question. When you run an event with scoring, you can also use grading to assign percentile grades to participant responses.	Grading and Scoring
Bonus-penalty	(Supported for SAP Ariba Strategic Sourcing Suite events only.) If you're using grading and scoring with product sourcing (a collection of features in SAP Ariba Strategic Sourcing Suite), you can use the bonus-penalty feature to assign bonuses or penalties to participant responses **after** bidding closes for an event. (Bid transformation events also enable you to adjust participant response values, but bid transformation values are configured **before** an event starts.)	Bonus-Penalty [page 516]

Additional Options for RFIs, RFPs, and Auctions

Option	Description	Additional Information
Access gates (prerequisite questions)	Access gates use prerequisite questions that prevent participants from accessing the event or submitting bids until they submit responses to the prerequisite questions. You can also withhold access until a participant's responses to the prerequisite questions are approved by a team member.	Prerequisite Questions [page 84]

Option	Description	Additional Information
Alternative bidding (alternative responses)	Alternate bidding lets participants submit additional or alternative bids after they have submitted a primary bid. You can configure alternative bidding to accept prices in alternative bids based on supplier-defined bundles, volume, or other term values.	Alternative Bidding [page 225]
Conditional content	Conditional content is visible only to a participant if they provide a response to a question that satisfies a condition. This enables you to provide different content to participants based on their responses to questions.	Working with Event Conditions [page 165]
Custom offline response sheets	SAP Ariba Sourcing supports offline response sheets, which enable participants to submit responses using a Microsoft Excel spreadsheet. In addition, buyers can create **custom** offline response sheets. If you create a custom offline response sheet, you can use Microsoft Excel features such as math functions (including the SUM function), custom formulas, and formatting.	Using Custom Offline Response Sheets [page 413]
Dynamic lookup tables	(Supported for SAP Ariba Strategic Sourcing Suite events only.) Dynamic lookup tables and formulas enable you to upload tables of data in Microsoft Excel workbooks that take input event or item values and base or calculate other values from the input values. For example, you can use a lookup table to that uses source and destination shipping information provided by a participant to calculate shipping costs.	Dynamic Lookup Tables and Lookup Formulas [page 533]
Envelope bidding	**Envelope bidding**, or sealed-envelope bidding, enables you to enclose the content of events in different envelopes (for example, technical and commercial). Participant responses to items in an envelope are not visible until the envelope is opened and envelopes must be opened in sequence (an envelope cannot be opened until all its predecessor envelopes have been opened). This behavior makes envelope bidding useful when regulations require that buyers view event sections that contain supplier responses in sequence. You can also use envelope bidding to eliminate participants based on certain criteria, such as technical responses, before viewing other criteria, such as price. ⓘ Note By default, envelope bidding is supported only for non-competitive events (events with the rules **Must participants improve their bids** and **Show lead bid to all participants** both set to **No**, which are the default values in RFI and RFP event templates). However, administrators can enable envelopes for competitive events [page 573].	Building Envelopes [page 135] Event Envelope Rules

Option	Description	Additional Information
International events (multi-language and multi-currency events)	To help you run international events with participants in multiple locales, SAP Ariba provides translated text for the user interface and for notifications. SAP Ariba also allows you to add translated text for customer-created fields. In addition, you can configure multiple currencies and exchange rates and allow participants to select currencies for their responses. Using the exchange rates, SAP Ariba calculates and displays participant responses in the currency preferred by the event owner.	About International Events [page 271]
Matrix pricing	Matrix pricing enables you to create a table of prices for an item or lot. For example, if a certain commodity has separate pricing for different regions, rather than manually create a separate item for each region, you can create one item for the commodity and then add a **Region** term as a matrix dimension. Participants provide separate responses for each combination of commodity and region.	Creating Event Matrix Pricing [page 128]
Multi-round bidding event	(Supported for guided sourcing events only). A multi-round bidding event enables you to create multiple bidding rounds in a single event. You can exclude participants and items when you create a new bidding round (you can also add back previously excluded participants or items).	Working with Multi-Round Bidding Events in Guided Sourcing
Multi-stage project	A multi-stage project consists of multiple events joined together using predecessor and follow-on project links. When you create a follow-on project, you can choose which elements to copy from the predecessor project, such as participants, items, and participant responses.	Content for Multi-Stage Projects [page 165]
Partitioned event	In a partitioned event, selected team members can invite their own participants to the event and view only responses from the participants they added.	Creating Partitioned Events [page 251]
Supplier-added items	You can create events that allow suppliers to add items and lots to primary and/or alternative bids.	Supplier-Added Items in Events [page 253]

Additional Options for RFPs Only

Option	Description	Additional Information
Email bidding	Email bidding enables participants to respond to single-item RFQ events through email or to multi-item RFP or RFI events through a bid sheet Excel file over email. Email bidding is supported only for RFI and standard-capacity RFP events.	Creating Content for Email Bidding [page 97]

Option	Description	Additional Information
Price breakdown	Suppliers don't submit a **Price** (per unit); instead, the **Price** is calculated using values that suppliers submit for terms (fields) that you configure as price components, such as parts and labor. Price breakdown RFPs are similar to total cost events. However, components for price breakdowns can only be added or subtracted (configured as adders or subtractors) to calculate the price per unit, so price breakdown calculations are not as complex as total cost calculations.	RFPs with Price Breakdown [page 222]
Pricing conditions	(Supported for SAP Ariba Strategic Sourcing Suite events only.) Pricing conditions enable buyers to request pricing from suppliers for different validity periods (for example, monthly, quarterly, annually, or custom) and for different volume scales.	RFPs with Pricing Conditions [page 242]

Additional Options for Auctions Only

Option	Description	Additional Information
Market feedback (bid information shown to participants)	You can configure event rules to control what market feedback is shown to participants. Market feedback is information about how a participant's prices compare with other participants' prices. Market feedback can include: • Responses from other participants • Bid history (all bids submitted by all participants) • Bid graph showing all bids • A participant's own rank • Leading bid SAP Ariba also provides market feedback rules that can restrict what information is visible to event owners and team members while an event is open for responses.	Event Market Feedback Rules
Traffic light auctions	Traffic light auctions are a type of English reverse auction, where suppliers submit decreasing bids and receive feedback about whether their bid will be considered in the form of green, yellow, and red traffic light icons. Traffic light bidding provides suppliers with a quick and easy way to view their position in an auction. Traffic light bidding is typically used to filter suppliers in multi-stage projects. Traffic light auctions are configured using the **Enable traffic light bidding** event bidding rule.	Enable traffic light bidding

Event Content Limits

SAP Ariba Sourcing has limits for the number of content items. Standard-capacity and simple-capacity events can contain up to 2000 total items. These limits are validated when you create and publish an event, or when you import content from Microsoft Excel, add to the content, or view the **Summary** page. If you attempt to add more than the content limit, SAP Ariba Sourcing displays an error message. For more information about simple-capacity events, refer to Simple RFx Events for Materials.

SAP Ariba Sourcing allows you to create large-capacity RFPs with higher content limits. Large-capacity RFPs are non-competitive RFPs that can contain up to 10,000 line items. Large-capacity RFPs are supported only in classic sourcing RFPs. The contents for large-capacity RFPs are accessed using Excel spreadsheets and are not directly visible in the user interface. For more information about large-capacity RFPs, see Using Large-Capacity RFPs [page 508].

Limits That Apply to All Events

The following table lists the limits that apply to all events, both are competitive or non-competitive. Additional limits for competitive events are described in the next section.

In a competitive event, participants can see market information, such as their own rank, the lead bid, and other competitors's bids or ranks. An event is non-competitive if participants cannot see any market information. Typically, auction events are competitive, and RFPs are non-competitive. The following table describes the event element limits in basic and professional:

Event Elements	Limit for Standard and Simple-Capacity Events	Limit for Large-Capacity RFP Events
Sum of all questions, requirements, and attachments ⓘ Note There are no limits on the number of sections.	500	500
Questions	no limit, but the sum of all questions, requirements, and attachments is limited to 500	100

Event Elements	Limit for Standard and Simple-Capacity Events	Limit for Large-Capacity RFP Events
Terms per line item	**Without cost group terms** 255 for events with 200 items or fewer. 30 for events with 200 or more items. **With cost group terms** 30 terms including terms within the cost group	**Without cost group terms** 255 for events with 200 items or fewer. 50 for events with 200 or more items. **With cost group terms** Not Applicable
Suppliers	700 For more information, see Inviting Participants for a Standard-Capacity Event [page 55].	700 For more information, see Inviting Participants for a Large-Capacity Event [page 56].
Number of bid responses from suppliers	100	125
Top-level items (includes lots but does not include items inside lots) for competitive events	200	n/a (large-capacity events are always non-competitive)
Top-level items (includes lots but does not include items inside lots) for non-competitive events	**Without cost group terms** 2000 **With cost group terms** 100	**Without cost group terms** 10,000 **With cost group terms** Not Applicable
Maximum number of items per section	2000	7500
Sum of all lots and line items (regardless of type of lot or if line items are inside or outside lots)	2000	10,000

> ⓘ Note
>
> - To support 700 suppliers in a standard-capacity event, you must set the `Application.AQS.RFX.EventLimits.CompetitiveEvent.MaxSuppliers` and `Application.AQS.RFX.EventLimits.NonCompetitiveEvent.MaxSuppliers` parameter values to 700.
> - To support 700 suppliers in a large-capacity event, you must set the `Application.AQS.RFX.EventLimits.LargeContentsRFP.MaxSuppliers` parameter value to 700.
>
> For more information, see Intelligent Configuration Manager Parameters Reference.

Additional Limits for Competitive Events

For competitive events, the following additional limits apply based on the lot type and the type of event (serial, staggered or parallel).

- For parallel competitive events:
  Maximum total number of items and lots during open bidding: 200
  This includes all standalone items, all lots, and all items in item lots, bundle lots, or supplier bundles. Items in basket lots are not counted towards this limit.
- For serial and staggered competitive events:
  Maximum number of items in item lots or bundle lots: 100

Related Information

Types of Lots [page 86]

Event Sizes and Reporting

The availability of an event for reporting can be determined by the event size. Events that exceed the following sizes and all large-capacity events are not sent for reporting until the Event Status is **Pending Selection**, **Closed**, or **Cancelled**.

- Competitive and non-competitive events with more than 100 items.
- Competitive and non-competitive events where the number of items multiplied by the number of suppliers is more than 1000.
- Non-competitive events with more than 100 questions.

For large-capacity events, information about individual line items is not sent for reporting; instead, a summary of the items is sent.

Examples for Item and Lot Combinations

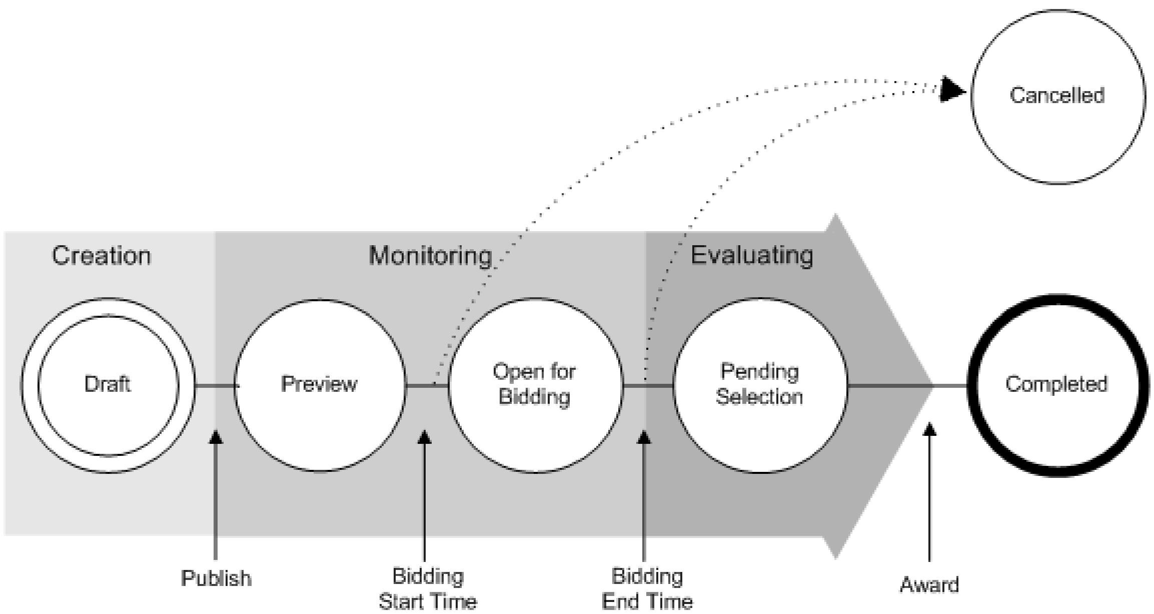
All examples use limits for standard-capacity events (not large-capacity events).

- Event with 20 item lots or bundle lots, each with 80 items:
  - Allowed for serial or staggered competitive events. The number of items in lots is less than 100, and the total number of all lots and items is less than the limit of 2000 (20 lots + 1600 items = 1620 total).
  - Not allowed for parallel competitive events. The maximum number of items and lots during open bidding in parallel competitive events exceeds 200.
  - Allowed in non-competitive events. Total number of items and lots is less than 2000.
- Event with 19 lots, 105 line items each:
  - Allowed in non-competitive events. Total number of items and lots is 1995 (less than 2000).
  - Not allowed in parallel competitive events if the lots are of type item lot or bundle lot, because 105 items exceeds the maximum number of items in item lots or bundle lots (100).
  - Allowed in competitive events (serial, staggered, or parallel) if the lots are of type basket lot (with item pricing collection after bidding).
- Event with 5 item lots with 40 items each, and 20 basket lots (with item pricing collection after bidding) with 90 items each:
  - Not allowed. Exceeds the total number of lots and items limit for all standard-capacity event types:
    5 item lots + 200 items in item lots + 10 basket lots + 1 800 items in basket lot = 2015.

SAP Ariba Sourcing Event Process

SAP Ariba Sourcing allows you to create and run events in which you exchange business information with other companies. Depending on the type of information you want to collect, you create different types of events, such as Request for Proposal (RPP) or auction events. All events are created from templates, which define rules and the types of information (such as the types of pricing terms) for the event. The event templates covered in this chapter are provided with the product. Only members of the global **Template Creator** group or a template's **Template Creator** team can modify a template.

In SAP Ariba Sourcing, an event follows a process from creation to awarding contracts to participants. An event has a status, corresponding to each stage in the event process, which determines the actions you can take. The following diagram illustrates the event process:



You can view the event status in multiple places in the user interface:

- On the upper right hand corner of the event monitoring interface.
- In the **My Documents** content item on the **Home** dashboard.

The following table describes the various event statuses in detail:

Status	Description
Draft	While you are creating an event, before you publish, it has a status of **Draft**.
Preview	When setting up an event, you can choose to have a period before the event opens for bidding when participants can preview it, answer questions or prepare their bids. You can optionally allow prebids, where suppliers can submit an initial bid or response.
Open	The event is open for participant responses. You can edit, cancel, or close the event. You can use **View as Participant**.

Status	Description
Pending Selection	The event has closed for responses and is pending your awarding selections. You can reopen or edit the event. You can no longer use **View as Participant**.
Completed	The event is completed. You can no longer reopen or edit it. The completed state is the end point of events that run their course normally.
Canceled	At any point after publishing an event, you can choose to cancel it. Canceling an event bypasses all the other statuses and immediately ends the event. The canceled state indicates that you aborted the event. You can undo the cancellation of an event.

The **Home** dashboard queries your event database every six hours and displays the events you created over the last three months, six months, or year, depending on the amount of events you have created.

The **My Documents** content item displays a maximum of 20 events (RFI/RFP/Auction/Survey) and a maximum of 50 projects (Sourcing/Contracts/SPM).

Related Information

Creating Event Templates [page 488]
About Editing Published Events [page 421]
Canceling Events [page 476]

Creating SAP Ariba Sourcing Events

Creating Sourcing Events Without a Sourcing Request

Use this procedure to create a sourcing event without a sourcing request.

Prerequisites

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)

Context

In most cases, you create sourcing events directly from the dashboard and without a sourcing request.

When editing an event, some portions of a page might be hidden from you, or be predefined. You may be able to skip some pages. The pages and fields depend on the event template you chose.

Keep the following in mind while you enter information on the **Create Sourcing Project** page:

- Do not use the following characters in the project name:
  `\ / : ? “ < > | # + % &`
- Do not use the following characters in other text fields, such as the **Title** field for events:
  `/ \ : * ? “ < > |`
- Fields with an asterisk are required.
- Contact SAP Ariba Customer Support if you want to change the required fields.
- A plus sign indicates that a field can have multiple values.
- Not all fields appear for all types of event. Consider the following when completing fields on the **Create Sourcing Project** page:
  - Test projects can be excluded from reporting, if you filter them out, but the system sends notification emails as it does for a normal event; so be careful not to inadvertently send misleading emails to participants or team members.
  - **Base Language** is used when there is no version of the template in the user’s language. You cannot change the base language after the event is created.
  - The **Owner** field usually defaults to the person creating the event. You can change or add owners. The last one added is listed on the Summary page in reports.
  - The **Commodity** field refers to the goods or services listed in the event. Commodities are also known as categories, or UNSPSC codes.
  - The **Baseline Spend** field indicates the amount you have traditionally spent for this event.
  - The **Target Savings %** field indicates the percentage you want to save for this event.
  - The **Predecessor Project** field indicates a related project or event that is run prior to the project you are creating. If you specify a predecessor project, you get a chance to select which content and suppliers to copy into the new project, and whether the previous bids are used an initial bids in the new event. **Regions**, **Departments**, **Baseline Spend**, **Commodity**, and **Target Savings%** fields can be used for reporting. These fields are not displayed to participants.
  - The **External System** field is visible only if your site is integrated with multiple external systems and specifies the name of the external system (ERP) that the event (or project) is integrated with.
    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.
  - The **Company Code, Purchasing Organization**, **Purchasing Group**, **Payment Terms**, **Document Type**, and **Document Category** fields are visible only if your site is integrated with external systems.

  For additional information about project fields, see Sourcing Project Fields [page 41].

Procedure

1. On the dashboard, click **Create** › **Sourcing Project**.
2. On the **Create Sourcing Project** page, enter a name and description for your event.

   You can enter an unlimited number of characters in the **Name** and **Description** fields. Other fields might limit you to 255 characters.
3. If you want to copy another project, choose the project or event you want to copy from the **Copy from Project** pull-down menu. The option, **Do you want to copy project groups that were not in the template, from the**

project being copied?, appears at the bottom of the page. Select **Yes** to import the project groups defined in the project or event you are copying.

The event type and template are automatically set to match the project or event you are copying. You can then modify the data you have copied.

4. Choose the event type that you want to create from the **Event Type** pull-down menu. The event type controls the display of event templates, which are different for each event type.
5. Click **Create**.

Related Information

SAP Ariba Sourcing event process [page 30]
SAP Ariba Sourcing Event Types [page 15]
Adding team members to event project groups [page 47]
Inviting registered suppliers to events [page 57]
Creating event content items [page 79]
Creating simple event formulas [page 151]
Creating SAP Business Network Discovery Postings for Private-Sector Events in SAP Ariba Sourcing [page 262]
Creating SAP Business Network Discovery Postings for Public-Sector Events in SAP Ariba Sourcing [page 268]
Publishing events [page 285]
Updating events [page 480]
Changing events to test events [page 293]
Using manual event scenarios to award suppliers [page 318]
Using event optimization scenarios to award suppliers [page 333]
Show Event Description field to participants [page 580]

Creating Events from a Sourcing Request

Sourcing requests are used to request sourcing events and sourcing projects. Sourcing requests typically contain multiple items that need to be obtained or sourced. After sourcing requests are approved, event managers can create a sourcing project or sourcing event to obtain the requested items.

About Creating Events from Sourcing Requests

In most cases, a sourcing request contains a sourcing event or sourcing project as a subproject of the request and an approval task. The subproject becomes visible in the **Documents** area of the sourcing request after the approval task is approved. The subproject is a placeholder that the event manager uses to create a sourcing event or project based on the information in the sourcing request. In addition, sourcing requests typically contain a **Sourcing Request Items** document; information in this document is propagated to the sourcing project created from the request and can include event rules, content (including line items), and participants.

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.

Sourcing Request Templates

The out-of-the-box sourcing request template can only be used to create sourcing requests that are initiated through the RFQ and Award Integration with SAP Ariba Sourcing feature. You can create sourcing request templates that can be used for creating sourcing request projects from the dashboard. You can also specify conditions that control which template is automatically used to create sourcing requests. For example, you can specify terms specific to a region or create visibility conditions for a commodity. The **Project History** tab shows the sourcing request template that was used and the templates that matched the conditions of the sourcing request.

Populating Full Sourcing Projects and Events with Information from Sourcing Requests

- 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.

Modifications to SAP RFQs

When an SAP user updates an RFQ that has a corresponding SAP Ariba sourcing request and project, SAP Ariba Sourcing sends an email notification to active team members. If possible, SAP Ariba Sourcing updates or cancels the sourcing request or event according to the request from the SAP ERP. In some cases, an event manager must manually update or cancel the request or event. For additional information, see Notifications for Sourcing Requests and Projects Created from an ERP Integration [page 559].

Modifications to Oracle RFQs

Modifications made to Oracle RFQs (deleted lines, deleted suppliers, or unit price updates) after the RFQ information is sent to SAP Business Network are not propagated to SAP Ariba (Oracle does not update table timestamps for these changes, so the adapter cannot detect these changes).

Rolling Up Line-Level Regions and Commodity Values to Header Regions and Commodity Fields

You can configure SAP Ariba to populate the **Commodity** and **Regions** project header fields in sourcing requests with values from line items in the **Sourcing Request Items** document. Line item values can also be aggregated and mapped to a higher-level in the region or commodity code hierarchy before being written (rolled up) to the project header field.

This feature is typically used with features to map SAP **Plant** and **Classification** (Class) values to SAP Ariba **Region** and **Commodity Code** values in sourcing requests created using RFQ data sent from SAP, as described in the Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions. RFQ data from SAP might not include commodity and region information at the header level, but can include classification data and plant IDs at the line level. SAP Ariba can map the classification data to commodity codes and map the plant ID to a region. This feature can then write the line item commodity and region values can to the **Commodity** and **Regions** header fields.

This feature uses the following site configuration options, which are set for you by SAP Ariba:

- `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable`
  If `true`, line item **Commodity** and **Regions** values are rolled up (written) to the project header. The default value is `false` (line item values are not rolled up).
- `Application.AQS.ERPIntegration.ItemToProjectAggregation.CommodityLevel`

Specifies the hierarchy level that line item **Commodity** values are aggregated to before being written to the project header. The default value is `2`. This parameter is ignored if `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` is `false`.

- `Application.AQS.ERPIntegration.ItemToProjectAggregation.RegionLevel`
  Specifies the hierarchy level that line item **Region** values are aggregated to before being written to the project header. The default value is `2`. This parameter is ignored if `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` is `false`.

Site configuration options are set for you by SAP Ariba. For more information about these options, see Site Configuration Options for Managing Events [page 561].

The top level for all region and commodity codes and regions hierarchies is Level 0, with the label **All**. The levels below Level 0 have higher level numbers (Level 1, Level 2, and so on) and are progressively more specific. For example, you could have a region hierarchy that includes the following entries:

- Level 0: **All**
  - Level 1: **Asia**
    - Level 2: **China**
      - Level 3: **Beijing Shanghai**

  If a line item has a region or commodity code level below the configured aggregation level (the line item has a larger level number), the ancestor at the aggregation level is written to the project header field. If a line item has a region or commodity code level at or above the aggregation level (the line item has a smaller level number), the line item's value is written to the project field (it is not mapped up to an ancestor). Duplicate values are not written to the project field.
  In this example,`Application.AQS.ERPIntegration.ItemToProjectAggregation.RegionLevel` is set to `2` and the **Sourcing Request Items** document contains line items with the following regions:
  - Item 1: **Beijing** (level 3)
  - Item 2: **Shanghai** (level 3)
  - Item 3: **Asia** (level 1)

  The following values are written to the project's **Regions** header field:
  - **China**
  - **Asia**

  The regions **Beijing** and **Shanghai** are mapped to the common level 2 ancestor, **China**. **Asia** is not mapped to an ancestor because its level number (1) is higher (less than) the configured aggregation level (2).

Rolling up Commodity and Regions with exact values

You can populate the project **Commodity** and **Regions** fields with the exact values from the **Sourcing Request Items** document (without mapping them to ancestors in the hierarchy) by setting `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` to `true` and setting `Application.AQS.ERPIntegration.ItemToProjectAggregation.CommodityLevel` and `Application.AQS.ERPIntegration.ItemToProjectAggregation.RegionLevel` to negative values.

Site configuration options are set for you by SAP Ariba. For more information about these options, see Site Configuration Options for Managing Events [page 561].

Additional References

For more information about the RFQ and Award Integration with SAP Ariba Sourcing feature, see RFQ and Award Integration with SAP Ariba Sourcing.

For more information about sourcing request templates, see Sourcing Request Templates.

For more information about creating a sourcing request from the dashboard, see Creating Sourcing Requests from the Dashboard.

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).

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.

Sourcing Project Fields

<table>
<tr><th>Field</th><th>Required</th><th>Description</th></tr>
<tr><td>Name</td><td>X</td><td>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:

<code>\ / : ? “ < > | # + % &</code>

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.</td></tr>
<tr><td>Description</td><td></td><td>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.</td></tr>
<tr><td>Copy from Project</td><td></td><td>Choose a project from the pull-down menu to copy data from an existing project into the new project.</td></tr>
<tr><td>Project</td><td>X</td><td>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 <code>Application.AQS.AllowableProjectType</code> site configuration parameter might be configured for your site to support only one project type and this field might not be editable.</td></tr>
<tr><td>Project State</td><td></td><td>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.</td></tr>
<tr><td>Planned Start Date</td><td></td><td>The date you plan to start the project. This field is used only for reporting.</td></tr>
<tr><td>Planned End Date</td><td></td><td>The date you plan to end the project. This field is used only for reporting.</td></tr>
</table>

Field	Required	Description
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 [page 72] and Searching Suppliers by ID [page 73] in the Event Management Guide [page 12].
Regions	To make **Regions** a **Required** field, contact SAP Ariba Customer Support.	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.

Field	Required	Description
Departments	To make **Departme nts** a **Required** field, con- tact SAP Ariba Cus- tomer Support.	The departments for the project or event. This is typically used to specify the depart- ment 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.
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** dropdown 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. In the classic user interface of SAP Ariba Sourcing, the **Predecessor Project** dropdown displays the list of previous projects and the **Other...** link. The **Other...** link enables you to find projects that are not in the previous projects list. In the guided sourcing user interface, the **Predecessor** dropdown displays the list of recent projects and the **Select other...** link. The **Select other...** link enables you to find projects that are not in the recent projects list.
Commodity	To make **Commodit y** a **Required** field, con- tact SAP Ariba Cus- tomer Support.	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 mem- bers, 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.

Field	Required	Description
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.
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.**.

Adding Event Team Members and Project Groups

About Event Team Members and Project Groups

The **Team** page specifies who can see and interact with the event when the project's access control is set to **Private to Team Members**. You create your own group for a project so that you can select which actions you want to allow group members to perform.

> Note
>
> The project groups in the **Team** page are different from the groups you add from the dashboard by clicking **Manage** > **Administration**. The groups you add on the **Team** page represent groups of users, for example, a group of supplier users for a particular commodity category.

The system grants each group permission to perform various tasks. A user can be in multiple groups.

- **Active Observers** can view and modify events, create and edit documents, tasks, and announcements, access participants' messages and see the audit logs. They get event notifications as Project Owners do.

  > Note
  >
  > Users with the Active Team Member role on the team of a Quick Project (event) can edit the event only if they're a project owner of the event.

- **Administrators** have permissions to edit the event such as to delete irrational bids that block the progress of the event. You can't change the members of this group.
- **Global Observers** can view all projects, Edit and Create Announcements, view audit logs, and access participants messages. The head of your sourcing organization might be a member of this group. Members of this group don't receive event notifications and can't edit documents and tasks. You can't change the members of this group.
- **Observers** can view announcements, but nothing else.
- **Project Owners** can edit this project. In Quick Projects (events), project owners can invite participants and add content (such as line items) to the event. Project owners can also edit event rules that were delegated to them in the event template. You can have multiple project owners, but the one listed on the Summary page is the one that appears in reports.

The user who creates an event is the original event owner. SAP Ariba Sourcing adds this user to the Project Owner group for the event. Users in this group have project owner capabilities. Members of other project groups can also have project owner capabilities, based on the other groups they belong to. Users with project owner capabilities for an event are called event owners.
For example, when a user belonging to any of the following groups is added to a Sourcing Project as a team member, the user gains project owner capabilities for the project.

- Event Administrator
- ACM Administrator
- Contract Administrator
- Sales Contract Administrator
- Internal Contract Administrator
- Project Manager

For a detailed description of project owner capabilities and which users have them, see Project Owner group and capabilities.

- **Surrogate Bidders** place bids for participants who are unable to place their own bids, perhaps because of technical problems. This group contains SAP Ariba Customer Support personnel to ensure proper market neutrality. You can't change the members of this group. Surrogate Bidders can't access or change participant account preferences.

> ⓘ Note
>
> When a user belonging to any of the following groups is added to a Sourcing Project as a team member, the user gains project owner capabilities for the project. This enables the user to access and edit all content that is available to the project owner.

You can add ad hoc project groups to your sourcing project using the **Add Group** button on the **Team** page. Each project group has different roles and permissions. The permissions specify the objects the users can access and the actions the users can perform in that project. For example, team members in the group **Team Members with Limited Access** can't send email notifications to users. Team members in the group **Active Team Member** can send email notifications to users.

Each group in the left column of the **Team** page is a project group with permissions relevant to this event only. By contrast the groups that are members of the local group are global groups with permissions across multiple projects or events. Your organization’s user administrator can add users to global groups.

For example, if you're a **Surrogate Bidder** you can add to members of the event’s **Surrogate Bidder** group on the **Team** page. But anyone you add is just a **Surrogate Bidder** for this event. The members list for **Surrogate Bidders** displays the system group of **Surrogate Bidders** plus the user you added, who isn't a member of the system **Surrogate Bidders** group.

> ⓘ Note
>
> To globally replace a team member with a different team member, contact your administrator.

Project Group Roles for Partitioned Events

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 they invited, or a **partition** of the event. For more information, refer to Creating Partitioned Events [page 251].

Additional Information About Project Teams

- Creating and managing project teams
- Project Owner group and capabilities

Allowing Team Members to View All Event Messages

You can assign the role, **Event Access All Messages**, and the permission, **EventCanAccessAllMessages**, to other users and enable them to view all the event messages that have been sent across the message board, even if that user was not part of the message. For example, you can create a project group for an event and assign the **Event Access All Messages** role to the project group. Now, all the users in that project group can view all of the event messages.

Adding Team Members to Event Project Groups

Use this procedure to add team members to even project groups.

Prerequisites

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)

⚠ Restriction

Project creators can only edit the **Active Observers** and **Project Owners** groups, unless the project creator is also a member of one of the other groups. Groups you create on this page are local to this project only.

Context

Add members of your own organization to the team that runs the event. The actions each user can perform depends on the group they are assigned to.

Procedure

1. On the **Team** tab, click the down-arrow at the right side of the entry field for the group to which you want to add a member.
2. Click **Search for more** to view recently-selected users (for any group) or search for additional team members.
3. Check the box to the left of the user you want to add.
4. Click **Done** in the lower right corner.

Related Information

About Event Team Members and Project Groups [page 45]
Removing Team Members from Event Project Groups [page 48]
Creating New Event Project Groups [page 49]

Removing Team Members from Event Project Groups

Use this procedure to remove team members from event project groups.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

⚠ Restriction

Project creators can only edit the **Active Observers** and **Project Owner**s groups, unless the project creator is also a member of one of the other groups. Groups you create on this page are local to this project only.

Context

Remove members of your own organization from the team that runs the event.

Procedure

1. On the **Team** page, click the down-arrow at the right side of the entry field for the group to which you want to remove a member.
2. Click **Search for more** to view recently-selected users (for any group) or search for additional team members.
3. In the **Currently Selected** list, deselect the user you want to remove.
4. Click **Done**.

Related Information

About Event Team Members and Project Groups [page 45]
Adding Team Members to Event Project Groups [page 47]
Creating New Event Project Groups [page 49]

Creating New Event Project Groups

Use this procedure to create new event project groups.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> Project creators can only edit the **Active Observers** and **Project Owners** groups, unless the project creator is also a member of one of the other groups. Groups you create on this page are local to this project only.

Context

The actions each user can perform depends on the group they are assigned to.

Procedure

1. Click **Add Group** on the **Team** page.
2. Enter a name for the group in the **Title** field.
3. To add roles to the group, click **select** to the right of the **Roles** field.
4. In the list of **Roles**, check the box next to the roles you want to select and click **Done**.

Related Information

About Event Team Members and Project Groups [page 45]
Adding Team Members to Event Project Groups [page 47]
Removing Team Members from Event Project Groups [page 48]

Creating Events That Do Not Allow Surrogate Bidding

Use this procedure to create events that do not allow surrogate bidding.

Prerequisites

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)

Context

Buyers who want more control of surrogate bidding at the event level, can use the **Limited Event Administrator** group. Users assigned to this group have all authorizations of the **Event Administrator** group except surrogate bidding. Users assigned to this group cannot surrogate bid.

Procedure

1. Create an event.
2. Go to the **Team** tab **Administrators** group.
3. Remove the **Event Administrator** global group and replace it with **Limited Event Administrator**.

Results

Surrogate bidding is not allowed on the event.

Related Information

Placing Surrogate Bids [page 441]
Surrogate Bidding When the Event Is Closed or Supplier Bids Are Visible [page 442]

Inviting Event Participants

About Inviting Event Participants

Inviting participants to your event is done on the **Suppliers** page for an RFI, RFP, and reverse auction, and on the **Participants** page for a forward auction. In solutions that include SAP Ariba Supplier Lifecycle and Performance, event rules in the template might also specify that preferred suppliers are automatically invited to events.

> ⓘ Note
>
> A forward auction is a sales event, as described in About Forward Auctions [page 18], so “participant” replaces “supplier” in many places throughout SAP Ariba Sourcing.

> ⓘ Note
>
> Team members can invite only those suppliers that are not invited by other team members.

When you publish your event, invited participants receive email invitations. You can add participants that already exist in the system or create new participants to invite. You can also invite participants from past events to sourcing events. If you invite a new participant, you must add them to an existing supplier or create a new one.

You can also flag incumbent suppliers, to remind you of which suppliers have this status. This information is useful when making your awarding decision. For example, in many cases, switching from an incumbent supplier incurs additional costs. You can flag the incumbent supplier at the line item level.

Depending on which solutions your company has purchased, you might be working with either supplier organizations or a different type of supplier. The type of supplier your site uses affects partipation invitation but does not otherwise have any impact on suppliers in events.

If you can search for suppliers from the search bar on any dashboard tab, and clicking a supplier's name in search results shows you the supplier's information on a **Profile** tab, your site uses supplier organizations. You use this procedure [page 67] to create a new supplier organization to add to the event as a participant.

If you view supplier information on the **Supplier Management** tab, your site uses the other type of supplier. You use this procedure [page 68] to request a new supplier from within an event.

You can also add participants by importing them from Excel documents. For more information, see Importing Event Participants from Microsoft Excel [page 396].

> ⓘ Note
>
> If you want to publish the event without inviting participants, contact your Designated Support Contact (DSC) to enable the parameter `Application.AQS.AllowPublishRFxWithoutSupplier`.

Inviting Large Number of Participants

SAP Ariba Sourcing allows you to invite a maximum of 700 suppliers for standard-capacity events and large-capacity events. For more information, see Inviting Participants for a Standard-Capacity Event [page 55] and Inviting Participants for a Large-Capacity Event [page 56].

To use large number of suppliers in sourcing events, you must set some of the parameter values in the **Manage > Administration > Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution:

- To add more than 100 suppliers to standard-capacity events, set the following parameters:
  - `Application.AQS.RFX.EventLimits.CompetitiveEvent.MaxSuppliers`
  - `Application.AQS.RFX.EventLimits.NonCompetitiveEvent.MaxSuppliers`
- To add more than 125 suppliers to large-capacity events, set the following parameter:
  `Application.AQS.RFX.EventLimits.LargeContentsRFP.MaxSuppliers`

For more information about the parameters, see the Intelligent Configuration Manager parameters reference guide.

When an event contains large number of suppliers, users are notified with a message in the following instances:

- Before buyers publish an event, buyers are notified about the maximum number of supplier responses supported for the event through the following warning message:
  - For standard-capacity event: `You have invited more than 100 suppliers to this event. SAP Ariba supports only a maximum of 100 supplier responses for this event.`
  - For large-capacity event: `You have invited more than 125 suppliers to this event. SAP Ariba supports only a maximum of 125 supplier responses for this event.`

  This message is displayed in the **Suppliers** and **Summary** tab of the event.
- Suppliers are notified with the following message if their bid response happens to be >= 101th response for a standard-capacity event or >=126th response for a large-capacity event:
  `The event has already received the maximum number of supplier responses. Hence, you cannot submit this response.`
- When buyers monitor the event through the event monitoring interface, buyers are notified with a message when the event receives a bid at 90%, 95%, and 100% of the allowed supplier response.
  This message is displayed in the right-bottom corner of the application and also in the **Messages** tab of the event monitoring interface.

> ⓘ Note
>
> You can also asynchronously export and import a manual scenario that supports large number of suppliers.

Downloading event reports with large number of suppliers

You can download specific reports for a standard-capacity event that contains more than 100 suppliers through the **Report** tab of the event monitoring interface. You can select upto a maximum of 100 participants at a time, using a search filter while downloading the reports.

You can also download specific reports for a large-capacity event that contains more than 125 suppliers through the **Report** tab of the event monitoring interface. You can select upto a maximum of 125 participants at a time, using a search filter while downloading the reports.

Type of Event	Reports You Can Download
Standard-capacity event	• Bid Comparison Report • Bids Report • Items Rank Report • Supplier Response Report
Large-capacity event	Items Rank Report

> ⓘ Note
>
> - Buyers cannot download Bid History Report, Questions and Terms Report, Full Bid Data Report, and Scenarios Report when the number of supplier responses for a standard-capacity event is greater than 100 and for a large-capacity event is greater than 125.
> - Large-capacity events do not support email bidding.

For more information, see Event Report tab.

Restrictions

- Maximum number of suppliers a buyer can invite to a standard-capacity sourcing event or a large-capacity sourcing event is 700.
- SAP Ariba supports a maximum of 100 supplier responses for a standard-capacity sourcing event.
- SAP Ariba supports a maximum of 125 supplier responses for a large-capacity sourcing event.
- SAP Ariba does not support configuring initial bids when the number of suppliers in the event is greater than 100.
- When the maximum number of supplier responses supported for the event is 100:
  - SAP Ariba does not support email bidding
  - SAP Ariba does not support creating optimization scenario
  - SAP Ariba does not support editing the event

Related Information

About Automatic Event Notifications [page 295]
Searching for SAP Business Network Discovery Suppliers [page 259]

Inviting Participants from Past Events to Sourcing Events [page 60]

Inviting Participants for a Standard-Capacity Event

SAP Ariba Sourcing allows you to extend the number of suppliers that you can invite to a standard-capacity event to a maximum of 700.

To invite 700 suppliers to a standard-capacity event, you must set the the following parameter values to 700 in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution:

- `Application.AQS.RFX.EventLimits.CompetitiveEvent.MaxSuppliers`
- `Application.AQS.RFX.EventLimits.NonCompetitiveEvent.MaxSuppliers`

You can also set a value to limit the number of suppliers whose information appears in the event monitoring interface. By default, the value for the number of suppliers you can view in the event monitoring interface is set to 100. To specify a limit for the number of supplier responses you can view in the **Content**, **Scenario**, and **Award** tabs of the event monitoring interface, you must set the `Application.AQS.RFX.LargeNumberOfSuppliers.DefaultFilterSize` parameter value in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of your SAP Ariba Sourcing solution.

For more information about enabling these parameters, see the Intelligent Configuration Manager parameters reference guide.

If the sourcing event contains more than 100 suppliers, buyers can export the sourcing event to an Excel file in the XLSX format.

> ⓘ Note
>
> When the sourcing event contains more than 100 suppliers, the validation of the sourcing event occurs when the buyer selects **Publish** to publish the event.

When the number of suppliers for a standard-capacity event is more than 100, you can use the **Search Filter** in the sourcing event and the event monitoring interface which helps you to easily view and edit the supplier and supplier responses. The **Search Filter** for a standard-capacity event with more than 100 suppliers is available in the following pages of the SAP Ariba Sourcing solution:

- **Add Item** or **Edit Item** page of a line item or lot in sourcing events.
- **Table Options Menu** > **Participants...** available in the **Content** tab of the event monitoring interface.
- **Table Options Menu** > **Participants...** available in the **Award** tab of the event monitoring interface.
- **Suppliers** tab in the event monitoring interface.
- When you create a manual scenario through the **Scenario** > **Create** > **Manual Scenario** page in the event monitoring interface, the search filter appears in:
    - **Award Proposal Details** > **Table Options Menu** > **Participants...**
    - **Advanced Award...** and **Others** pages of a line item or lot in the **Award Proposal Details** tab.
      The **Others** page lists the suppliers based on the set limit of the `Application.AQS.RFX.LargeNumberOfSuppliers.DefaultFilterSize` parameter. For example, if the `Application.AQS.RFX.LargeNumberOfSuppliers.DefaultFilterSize` value is set to 10 and the supplier responses received is more than 10, then 10 suppliers are displayed by default for the line item or lot and the additional suppliers appear in the **Others** page.

- When you create an optimization scenario through the **Scenario** > **Create** > **Optimization Scenario** page of the event monitoring interface,the search filter appears in:
  - **Goals and Constraints** > **Add Constraint** page. In the **Add Constraint** page, the search filter appears when you select the **I want to specify a value that contrains the number of suppliers I will award to, and only consider the specified suppliers** as the constraint type and choose **I will select the suppliers from the below list** or **I only want suppliers from the below list that bid on all items** options as the specified suppliers.
  - **Award Proposal Details** > **Table Options Menu** > **Participants...** page after specifying the constraints for your optimization scenario.

Restrictions

- Maximum number of suppliers a buyer can invite to a standard-capacity sourcing event is 700.
- SAP Ariba does not support configuring 700 initial bids for 700 suppliers in the sourcing event.
- SAP Ariba supports only a maximum of 100 bid responses for a standard-capacity sourcing event with 700 suppliers.

Inviting Participants for a Large-Capacity Event

SAP Ariba Sourcing allows you to extend the number of suppliers that you can invite to a large-capacity event to a maximum of 700. For information about large-capacity events, see Using Large-Capacity RFPs [page 508].

To invite 700 suppliers to a large-capacity event, you must set the the following parameter value to 700 in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution:

`Application.AQS.RFX.EventLimits.LargeContentsRFP.MaxSuppliers`

You can also set a value to limit the number of suppliers whose information appears in the event monitoring interface. By default, the value for the number of suppliers you can view in the event monitoring interface is set to 100. To specify a limit for the number of supplier responses you can view in the **Content**, **Scenario**, and **Award** tabs of the event monitoring interface, you must set the `Application.AQS.RFX.LargeNumberOfSuppliers.DefaultFilterSize` parameter value in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of your SAP Ariba Sourcing solution.

For more information about enabling these parameters, see the Intelligent Configuration Manager parameters reference guide.

If the sourcing event contains more than 125 suppliers, buyers can export the sourcing event to an Excel file in the XLSX format.

> **Note**
>
> When the sourcing event contains more than 125 suppliers, the validation of the sourcing event occurs when the buyer selects **Publish** to publish the event.

When the number of suppliers for a large-capacity event is more than 125, you can use the **Search Filter** in the sourcing event and the event monitoring interface which helps you to easily view and edit the supplier and supplier responses. The **Search Filter** for a large-capacity event with more than 125 suppliers is available in the following pages of the SAP Ariba Sourcing solution:

- **Add Item** or **Edit Item** page of a line item or lot in sourcing events.
- **Table Options Menu** > **Participants...** available in the **Content** tab of the event monitoring interface.
- **Table Options Menu** > **Participants...** available in the **Award** tab of the event monitoring interface.
- **Suppliers** tab in the event monitoring interface.
- When you create an optimization scenario through the **Scenario** > **Create** > **Optimization Scenario** page of the event monitoring interface,the search filter appears in:
    - **Goals and Constraints** > **Add Constraint** page. In the **Add Constraint** page, the search filter appears when you select the **I want to specify a value that contraints the number of suppliers I will award to, and only consider the specified suppliers** as the constraint type and choose **I will select the suppliers from the below list** or **I only want suppliers from the below list that bid on all items** options as the specified suppliers.

Restrictions

- Maximum number of suppliers a buyer can invite to a large-capacity sourcing event is 700.
- SAP Ariba supports only a maximum of 125 bid responses for a large-capacity sourcing event with 700 suppliers.

Inviting Existing Suppliers to Events

Use this procedure to invite existing suppliers to events.

Prerequisites

Before you can invite a supplier to an event, the supplier must exist in SAP Ariba Sourcing.

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)

> ⓘ Note
>
> - If you search for a supplier that is a subsidiary of a parent organization, the search results display only the supplier's parent organization or organizations. However, the search results display users for the supplier you are searching for. For example, if you search for participants in XYZ company, the search returns users in XYZ Company, but not in its parent, ABC Company.
>   If you search for a supplier that has subsidiaries, the search results display only the supplier organization you searched for, not any subsidiaries. You can click the organization name link to view any subsidiaries, if they exist.
> - When you search for suppliers in SAP Ariba Sourcing, the maximum number of search results that you see depends on whether your site has SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture). In sites with either of these solutions, when you search for suppliers, you see a maximum of 700 search results. One supplier user, not one supplier organization, counts as one search result. When you search for a supplier organization that includes 50 supplier users, you see 50 search results, not just one.
>   In sites without SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), when you search for suppliers, you see a maximum of 2000 search results. In sites with SAP Ariba Supplier Information and Performance Management (classic architecture), when you search for suppliers, you see a maximum of 2000 search results.
> - In site with SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), participant search includes filters for **Commodity Categories** and **Regions**. These filters return results for suppliers that match the filter values in any supplier management activity such as registration or qualification. To search for suppliers that are **qualified** for the selected commodities and regions, use the **Qualification Status** filter as well.
> - If you change an invited supplier's organization name while the event is live, the supplier can't participate in the event.

Context

If you want to invite all the users from a specific supplier organization, click the check box next to the supplier organization name. This adds only the users from the specific supplier organization and does not add users from the organization's subsidiaries, if they exist.

When you create a new SAP Ariba Sourcing project, you can specify whether there is a predecessor project. If you specify a predecessor project, it creates a multi-round stage event, and you can choose what to import from the predecessor project. This includes importing participants from the predecessor project.

If your solution includes SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), in which case you use the **Supplier Management** tab, event templates can include a setting that defines eligibility criteria for inviting participants to events, based on their status in the supplier management process. The least restrictive setting (**Not Registered**) includes all existing suppliers, while the most restrictive setting (**Qualified**) requires that suppliers be qualified in the event's commodities and regions in order to be available for invitation to participate. If your event's template uses this setting, the list of participants you can add to events might be restricted by it.

ⓘ Note

If your site includes SAP Ariba Supplier Lifecycle and Performance and you use process projects for supplier qualification, refer to About Supplier Qualification and SAP Ariba Sourcing Events.

ⓘ Note

To globally replace a participant with a different participant, contact your administrator.

Procedure

1. Click **Suppliers** on the left side of the **Event** page.
2. Click **Invite Participants**. Alternatively, you can click **Excel Import** to import a list of suppliers.

   ⓘ Note

   Excel import functionality is only available while working with a draft version of the event. After an event has been published, the **Excel Import** button does not appear.
3. Perform one of the following actions:
   - Enter all or part of the supplier's name, postal address, vendor ID, or SM ID, or any other search term in the search field.

     ⓘ Note

     Do not use multiple search criteria in a single supplier search. If you include multiple search criteria in your query, it might return unexpected results.
   - To add a search filter, click the add icon (⊕), choose a search field from the dropdown menu, and select or enter a value, depending on the search field you choose.

   You can continue adding search filters using the add icon (⊕), or remove them using the remove icon (⊖).
4. In the search results, check the participants that you want to add.
5. If you are done searching for participants, click **OK** to return to the **Suppliers** page. If you want to add more participants, click **Add More**.

   If you chose **Add More**, a success message appears saying the suppliers were added and you can add more. You are still on the **Invite Participants** page.

   ⓘ Note

   The entered search field criteria stays in the search fields so you can make fewer changes for your next search.

   The search results from the previous search are cleared.
6. Enter additional search criteria and click **Search** for more participants.

   If the search results contain any participants already invited to the event, they are shown as checked and display only.

If you want to remove participants, go to the **Suppliers** page.

7. When you are finished inviting participants, click **OK** or **Cancel** to go back to the **Suppliers** page.

Results

If your solution includes SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), in which case you use the **Supplier Management** tab, and depending on your site's configuration and the supplier's registration status, the participants you invite might also receive an invitation to register; might need to complete the registration questionnaire; or might require approval of their registration answers before being able to access the event to which you invite them.

Related Information

About Inviting Event Participants [page 52]
Creating New Supplier Organizations in Events [page 67]
Creating Sourcing Event Data Using Excel [page 373]
Creating New Participants for Existing Suppliers in Events [page 65]

Inviting Participants from Past Events to Sourcing Events

Use this procedure to search for participants from past events and invite them to sourcing events.

Prerequisites

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)

Context

You can invite participants from past events to sourcing events without needing to copy a past project. This is useful if you created a sourcing project through external integration, which doesn't support project copying.

Procedure

1. From the event monitoring interface, go to the **Suppliers** tab.
2. Select **Invite Suppliers**.
3. Select the **Search by** option and choose **Past events**.
4. Configure your search options.

   You can search by **Title**, **ID**, **Owner**, and **Description**.
5. Select **Search**.
6. Choose an event document from the search results at the bottom of the screen.
7. Click **Select**.
8. Choose at least one participant.
9. Select **Copy**.

Results

The selected participant(s) appear in the **Suppliers** tab of your event monitoring interface.

Automatically Adding Preferred Suppliers to Events

Use this procedure to automatically add preferred suppliers to events.

Prerequisites

SAP Ariba Supplier Lifecycle and Performance is required to use this feature.

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)

Context

Buyers can see the supplier qualification status based on region and commodity for an event. They can automatically invite preferred suppliers to events based on the commodity and region specified during the event creation process.

You can manually check both the supplier registration and qualification status for suppliers in their sourcing event by clicking the **Update Supplier Status** button. SAP Ariba updates all suppliers' registration and qualification status for all items when you click **Update Supplier Status** on the **Suppliers** tab.

Procedure

1. Create an RFP event.
2. Go to the **Content** page and click **Add** > **Line Item**.
3. Add the **Commodity** and **Region**.

   > ⓘ Note
   >
   > If the **Commodity** field is empty, the system returns a list of all suppliers that are qualified for all of the commodities.
   >
   > If the **Region** field is empty, the system returns a list of all suppliers that are qualified for all of the regions.
   >
   > If the **Commodity** and **Region** fields are empty, the system returns a list of all suppliers that are qualified for all of the commodities and all of the regions.
4. The **Suppliers** tab **Invited Participants** is populated with qualified suppliers.

   > ⓘ Note
   >
   > **Invited Participants** has **Yes** for **Qualified** and **Preferred** when the supplier is qualified or preferred for any item in the event.

   The suppliers are automatically invited to the event for every item.

5. To manually check the supplier registration and qualification status for suppliers, click **Update Supplier Status** on the **Suppliers** tab.

   SAP Ariba updates all suppliers' registration and qualification status for all items.

Next Steps

After you automatically add preferred suppliers to events, you can:

- Click each supplier and go to their organization profile to see their qualification status, region, and commodity information.
- Check the supplier name and click **Remove** to remove the supplier from the event.
- Click **Invite Another Participant** to add more participants.
- Open the item and see the list of suppliers added.
- Change the region or commodity for the item and click **Refresh Invitees** to update the list of preferred suppliers. The event suppliers on the **Suppliers** page are also updated.

  > ⓘ Note
  >
  > Changing the region or commodity for the item does not remove any suppliers but their preferred status may change.

Automatically Adding Preferred Suppliers to Line Items

Use this procedure to automatically add preferred suppliers to line items.

Prerequisites

SAP Ariba Supplier Lifecycle and Performance is required to use this feature.

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)

Only invite participants to items where they meet the minimum qualification status on the **Participant Search** page must be checked. To access the **Participant Search** page, open the **Suppliers** page and click **Invite Participants**.

> ⓘ Note
>
> If you do not check **Only invite participants to items where they meet the minimum qualification status**, any supplier invited to the event is invited to all items even if they are not qualified.

Context

Buyers can see the supplier qualification status based on region and commodity for an event. They can also automatically invite preferred suppliers to line items based on the commodity and region specified during the event creation process.

You can manually check both the supplier registration and qualification status for suppliers in their sourcing event by clicking the **Update Supplier Status** button. SAP Ariba updates all suppliers' registration and qualification status for all items when you click **Update Supplier Status** on the **Suppliers** tab.

Procedure

1. Create an RFP event.
2. Go to the **Content** page and click **Add** > **Line Item**.
3. Add the **Commodity** and **Region**.

    > ⓘ Note
    >
    > If the **Commodity** field is empty, the system returns a list of all suppliers that are qualified for all of the commodities.
    >
    > If the **Region** field is empty, the system returns a list of all suppliers that are qualified for all of the regions.
    >
    > If the **Commodity** and **Region** fields are empty, the system returns a list of all suppliers that are qualified for all of the commodities and all of the regions.

4. Complete the remaining line item information and click **Done**.
5. Click **Refresh Invitees** in the **List of Invited Participants**.

    Preferred suppliers for the item's selected commodity and region appear in the **List of Invited Participants** with the **Preferred** and **Qualified** columns set to **Yes**.

    Suppliers that are preferred and qualified are automatically invited to the event and the line item.

Next Steps

After you automatically add qualified suppliers to line items, you can:

- Check the supplier name and click **Remove** to remove the supplier from the item.
- Check the supplier name and click **Incumbent** to mark the supplier as an incumbent.
- Click **Add Participants** to add more participants.

  > Note
  >
  > The **Unassigned Suppliers** section on the **Suppliers** page shows the suppliers invited to the event but not to an item. These suppliers are invited to the event by contact.

- Change the region or commodity for the item and click **Refresh Invitees** to update the list of preferred suppliers. The event suppliers on the **Suppliers** page are also updated.

  > Note
  >
  > Changing the region or commodity for the item does not remove any suppliers but their preferred status may change.

Creating New Participants for Existing Suppliers in Events

Use this procedure to create new participants for existing suppliers in events.

Prerequisites

- You must be the event owner or have project owner capabilities for the event.
- If you can search for suppliers from the search bar on any dashboard tab, and clicking a supplier's name in search results shows you the supplier's information on a **Profile** tab, your site **uses supplier organizations**. In sites that use supplier organizations, you must also be a member of one of the following groups:

  Commodity Manager
  Event Administrator
  Sourcing Manager
  Supplier/Customer Agent
  Supplier/Customer Manager
  Supplier/Customer User Agent
- If you view supplier information on the **Supplier Management** tab, your site does **not use supplier organizations**. In sites that do not use supplier organizations, you must also be a member of one of the following groups:

  Supplier/Customer Manager

Supplier/Customer User Agent

Procedure

1. Click **Suppliers** on the left side of the **Event** page.
2. Click **Invite Participants**.
3. Click **Create New Participant**.
4. In the **Participant User Information** area, enter details about the supplier user or contact. Be sure to enter the correct email address; SAP Ariba Sourcing sends the supplier's invitation to this address, introducing them to the application and allowing them to set their initial password.
5. Specify the supplier's **Locale**.
6. If your site uses supplier organizations, the **Participant Organization Information** section includes fields that allow you to create a new supplier in the event; in that section, click **Select Existing**.
7. On the **Organization Name** dropdown menu, perform one of the following actions:
    - Choose a supplier.
    - Choose **Search more**, select a supplier from the available supplier list, and click **Done**.
8. Click **OK**.

Results

The new participant is added to the event and is invited to participate after you publish the event. The new participant is also added to the existing supplier as a supplier user or contact.

If your site uses supplier organizations, in the search bar on the dashboard, choose **Suppliers and Customers** from the search type dropdown menu, enter the supplier's name, and press `Enter`. When you click on the supplier's name in the search results, you will see the participant in the **Users** area on the supplier's **Profile** tab.

If your site uses the other SAP Ariba supplier model, click the **Supplier Management** tab, enter the supplier's name in the search field, and press `Enter`. Click the supplier in the search results to open its 360° view. When you click the **Contacts** tab on the **Overview** tile, you will see the new participant.

Creating New Supplier Organizations in Events

Use this procedure to create new supplier **organizations** in events. If you can search for suppliers from the search bar on any dashboard tab, and clicking a supplier's name in search results shows you the supplier's information on a **Profile** tab, use the procedure in this topic.

Prerequisites

If you view supplier information on the **Supplier Management** tab, you must use this procedure [page 68] to create a new supplier rerquest in events instead.

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)

Context

Before you create a new supplier organization, search to see if they are already in the system.

Procedure

1. Click **Suppliers** on the left side of the **Event** page.
2. Click **Invite Participants**.
3. Click **Create New Participant**.
4. In the **Participant User Information** area, enter details about the supplier. Be sure to enter the correct email address; SAP Ariba Sourcing sends the supplier’s invitation to this address, introducing them to the application and allowing them to set their initial password.
5. Specify the supplier’s **Locale**.

6. In the **Participant Organization Information** area, enter details about the supplier's company. Be sure to add the commodities areas for the supplier. This enables you to perform commodity area searches for suppliers and quickly find the supplier appropriate to your needs.
7. Add profile information as needed.
8. Click **OK**.

Related Information

About Inviting Event Participants [page 52]
Inviting Existing Suppliers to Events [page 57]
Importing Event Data from Predecessor Projects [page 172]

Creating a New Supplier Request in an Event

Use this procedure to create supplier requests (**not** supplier organizations) in events. You don't create a new supplier outright. Instead, you create a request, and once it's approved, the new supplier is created in your site. If you view supplier information on the **Supplier Management** tab, use the procedure in this topic.

Prerequisites

If you can search for suppliers from the search bar on any dashboard tab, and clicking a supplier's name in search results shows you the supplier's information on a **Profile** tab, you use this procedure [page 67] to create new supplier organizations in events instead.

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)

You must also be a member of the **Supplier Request Manager** group to create supplier requests.

The supplier request with Dun & Bradstreet lookup is only available in sites with the D&B integration feature enabled.

Context

While you're creating a supplier request, SAP Ariba searches the database to see if there are any existing suppliers or previously denied requests with the same information and identifies potential duplicates. If the supplier you're requesting already exists in your site, or was previously denied by approvers, you can cancel the request.

You can save a supplier requests as a draft so that you can exit the form without losing your current answers. You can complete and submit a draft supplier request later, or you can discard it. The draft supplier request isn't validated until you submit it.

If your site is integrated with Dun & Bradstreet:

- To create a supplier request using Dun & Bradstreet lookup, you search for the supplier you want to request in the D&B database. If the supplier is in the D&B database, you select it, then fill out the request form. D&B information for supplier name, address, and Dun & Bradstreet ID (D-U-N-S number) are automatically added to the request form.
- If you don't see the supplier you want to request in the D&B database, you can perform one of the following actions:
  - Ask the supplier to register with D&B. Once they've done so, you can create the request by selecting the supplier in the D&B search.
  - Fill out the request even though you can't find the supplier in the D&B database. In this case, the supplier probably isn't registered with D&B, and the supplier request includes questions about why you need an exception to your organization's general requirement that all suppliers have D-U-N-S numbers. Provide the supplier name and address information that would otherwise automatically be added to the request by D&B. Depending on your organization's processes, approval of requests for suppliers that aren't registered with D&B can be different.

> Note
>
> - Lookups through the Dun & Bradstreet Data Integration Toolkit are in principle free of charge unless there's a misuse of the current customer agreement.
> - Attachments in supplier management questionnaires can't include embedded documents.

Procedure

1. Click **Suppliers** on the left side of the **Event** page.
2. Click **Invite Participants**.
3. Click **Create New Supplier**.

Perform these steps only if the supplier request uses D&B lookup:

4. On the **Search Supplier** by dropdown menu, choose one of the following options:
   - D-U-N-S Number
   - Phone number
   - Name
   - Business ID (Tax ID, VAT ID, other ID)
   - Email or website

5. Enter search criteria and choose **Search**. Some options require you to specify the supplier's country or region. Required fields for each option are indicated by an asterisk (*).
6. Review the list of suppliers in the D&B database that match your search criteria and perform one of the following actions:
   - If you see the supplier you want to request in the list, select them and choose **Next**.
   - If you don't see the supplier you want to request in the list, and you don't want to ask the supplier to register with D&B before you create a request for them, choose **Can't find supplier**.

Perform these steps to complete the supplier request whether or not it uses D&B lookup:

7. Enter information about the supplier you want to add to the event in the supplier request form.
8. If SAP Ariba identifies any existing suppliers or previously denied requests that match the information in your request, perform the following actions:
   a. Choose **See duplicates**.
   b. Review potential duplicate suppliers. If you agree with a suggested match, choose **Cancel Request**. If you do not think any of the potential matches is the same supplier, choose **Close**.
9. Perform one of the following actions:
   - To submit the request for approval, choose **Submit**.
   - To save the request as a draft to finalize and submit later, choose **Save**.

Results

If you submitted the supplier request form, it's sent for approval. You receive a notification when the request is approved or denied. If your request is approved, the new supplier is added to the supplier database. If the request is denied, it's not.

If you saved a draft of the supplier request, it's available on the **Supplier Request** tile on the **Supplier Management** dashboard. You can also view the draft supplier requests you created in the **My Documents** content item on the **Home** dashboard.

Next Steps

Requested suppliers aren't automatically added to the event where you created the request. If your supplier request is approved, you must then edit the event to add the new supplier as a participant.

Related Information

About Inviting Event Participants [page 52]
Creating New Participants for Existing Suppliers in Events [page 65]
Inviting Existing Suppliers to Events [page 57]

Creating Event Supplier Response Teams

Use this procedure to create event supplier response teams.

Prerequisites

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)

> ⚠ Restriction
>
> SAP Ariba Sourcing does not allow more than one response team member to submit a bid at the same time. Response team members can access events, view messages, and view the **Response History** at the same time. You can remove contacts from a response team before bidding starts.

Context

If you invite more than one contact from a supplier organization to your event, you can group them into a supplier response team so they can work on one response as opposed to each contact providing their own individual response.

When you add participants to a response team, they appear in a hierarchical view below their organization name and **Yes** appears in the **Response Team** column. If a response team exists for an organization and additional participants from the same organization are added before bidding starts, the participants are automatically added to the existing response team.

You can also choose to automatically add suppliers to response teams when you create events. When the **Can Project Owner Create Response Team by Default** rule is enabled, suppliers are automatically added to a response team when they are added to an event. Supplier response teams can be modified regardless of how the **Can Project Owner Create Response Team by Default** rule is set. Enabling this rule can help ensure that project owners automatically create events with suppliers working as supplier response teams.

You can also create a supplier response team when you import participants data. When you import participants from a Microsoft Excel spreadsheet, enter **Yes** in the **Response Team** column to add them to a supplier response team.

Procedure

1. Click **Suppliers** on the **Event** page to view **Invited Participants**.
2. Click the check box next to the participants you want to add to the response team.
3. Choose **Response Team** from the **Set/Clear** pull-down menu.
4. Click the check box next to a participant and click **Remove** to remove a participant from a response team.

> ⓘ Note
>
> This procedure is applicable only to classic sourcing.

Related Information

About Inviting Event Participants [page 52]
Importing Event Participants from Microsoft Excel [page 396]

Including the Supplier ID in Supplier Selection Lists

You can include supplier IDs in selection lists, such as the dropdowns for suppliers in savings forms and the mass edit utility.

This information is useful if your supplier list includes multiple suppliers with the same supplier name, but different supplier IDs. With this feature, the supplier ID appears in parentheses after the supplier name.

If you **don't** have SAP Ariba Supplier Lifecycle and Performance, this feature works for only one domain that you must set with a site configuration parameter. If you **do** have SAP Ariba Supplier Lifecycle and Performance, set the parameter to the domain **SAP**. (In the remainder of this topic, SAP Ariba Supplier Lifecycle and Performance means both SAP Ariba Supplier Lifecycle and Performance and SAP Ariba Supplier Information and Performance Management (new architecture).)

Prerequisites

To search for supplier domains, you must be a member of the **Customer Administrator** or **Master Data Manager** groups.

Set the configuration parameter

Set the site configuration parameter **Show the supplier ID in the user interface** (`Application.SupplierChooser.OrganizationIDDomainName`) to the domain name you want to use for showing supplier IDs. If you don't have SAP Ariba Supplier Lifecycle and Performance, it's possible to set the domain name to any organization ID (for example, ERP ID, ASM ID). This parameter is self-service; a member of the **Customer Administrator** group can set it in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.

How to choose the domain name to use for showing supplier IDs

The way you determine the domain name to use depends on whether you have SAP Ariba Supplier Lifecycle and Performance.

- To see your suppliers' domain if you **don't** have SAP Ariba Supplier Lifecycle and Performance, follow these steps:
  1. In the dashboard, on the left side of the search bar, select **Suppliers and Customers**, then search for a supplier. The **Search Suppliers and Customers** page appears. Click **Search**.
  2. In the search results, click the supplier's name.
     The supplier's **Organization Profile** page appears.
  3. On the **Profile** tab, click **Actions** > **View** > **Organization IDs**.
     The supplier's domain appears in the **Domain** column, and the supplier's ID appears in the **Value** column.
- If you have SAP Ariba Supplier Lifecycle and Performance, use the domain **SAP** and see the section on additional requirements for SAP Ariba Supplier Lifecycle and Performance.

Additional requirements if you have SAP Ariba Supplier Lifecycle and Performance

If you have SAP Ariba Supplier Lifecycle and Performance, there are two additional requirements:

- The supplier must be integrated with the ERP system. In SAP Ariba Supplier Information and Performance Management (new architecture), ERP integration status appears in the supplier **Summary** under **Status**; otherwise, ERP integration status appears in the upper right corner to the right of the vendor IDs.
- The supplier must show **SAP** in the **sourceSystem** column when you export supplier data from **Manage** > **SM Administration** > **Data import or export** > **Export your currently available data**.

If you set the value of the parameter to the suppliers' domain, when you search for suppliers using a dropdown, the supplier ID appears in parentheses after the supplier name. The default for this parameter is blank. When the parameter is blank, no supplier IDs appear next to the supplier names.

Searching Suppliers by ID

Searching for suppliers by ID rather than by name can be useful if your supplier list includes multiple suppliers with the same supplier name, but different supplier IDs.

Buyers can search for suppliers by **Supplier ID** in the **Mass Edit Projects** utility, in supplier savings forms, and in contract workspaces.

If you **don't** have SAP Ariba Supplier Lifecycle and Performance, this feature works for only one domain that you must set with a site configuration parameter. If you **do** have SAP Ariba Supplier Lifecycle and Performance, set the parameter to the domain **SAP**. (In the remainder of this topic, SAP Ariba Supplier Lifecycle and Performance means both SAP Ariba Supplier Lifecycle and Performance and SAP Ariba Supplier Information and Performance Management (new architecture).)

Prerequisites

To search for supplier domains, you must be a member of the **Customer Administrator** or **Master Data Manager** groups.

Set the configuration parameter

Set the site configuration parameter **Show the supplier ID in the user interface** (`Application.SupplierChooser.OrganizationIDDomainName`) to the domain name you want to use for showing supplier IDs. If you don't have SAP Ariba Supplier Lifecycle and Performance, it's possible to set the domain name to any organization ID (for example, ERP ID, ASM ID). This parameter is self-service; a member of the **Customer Administrator** group can set it in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.

How to choose the domain name to use for showing supplier IDs

The way you determine the domain name to use depends on whether you have SAP Ariba Supplier Lifecycle and Performance.

- To see your suppliers' domain if you **don't** have SAP Ariba Supplier Lifecycle and Performance, follow these steps:
    1. In the dashboard, on the left side of the search bar, select **Suppliers and Customers**, then search for a supplier. The **Search Suppliers and Customers** page appears. Click **Search**.
    2. In the search results, click the supplier's name.
       The supplier's **Organization Profile** page appears.
    3. On the **Profile** tab, click **Actions** > **View** > **Organization IDs**.
       The supplier's domain appears in the **Domain** column, and the supplier's ID appears in the **Value** column.
- If you have SAP Ariba Supplier Lifecycle and Performance, use the domain **SAP** and see the section on additional requirements for SAP Ariba Supplier Lifecycle and Performance.

Additional requirements if you have SAP Ariba Supplier Lifecycle and Performance

If you have SAP Ariba Supplier Lifecycle and Performance, there are two additional requirements:

- The supplier must be integrated with the ERP system. In SAP Ariba Supplier Information and Performance Management (new architecture), ERP integration status appears in the supplier **Summary** under **Status**; otherwise, ERP integration status appears in the upper right corner to the right of the vendor IDs.
- The supplier must show **SAP** in the **sourceSystem** column when you export supplier data from **Manage** > **SM Administration** > **Data import or export** > **Export your currently available data**.

If you set the value of the parameter to the suppliers' domain, you can search for suppliers by **Supplier ID** in the **Mass Edit Projects** utility, in savings forms, or when searching for suppliers to add them to events. The default for this parameter is blank. When the parameter is blank, you can't search by **Supplier ID**.

How to Search by Supplier ID **in the** Mass Edit Projects **Utility**

1. Go to **Administration** > **Project Manager** > **Mass Edit Projects**.
2. Search for projects for which you want to search the supplier by **Supplier ID**. For example, to see contracts, for **Project Type**, select **Contract Workspace (Procurement)**. From the list that appears, select the contracts for which you want to search suppliers by ID and click **Add**. These contracts appear under the **Projects to update** tab. Click **Next**.
3. Under **Select Project fields to update**, select **Supplier** and click **OK**.
4. On the next page, under **Update Types**, click **Add**, **Delete**, or **Replace**, depending on your mass edit task. Click **[select]**. The **Choose Values for Supplier** page appears.
5. In the dropdown under **Add to Currently Selected**, change **Organization Name** to **Supplier ID**. In the field next to **Supplier ID**, type all or part of an ID and click **Search**. The matching suppliers appear.

Creating Event Content

About Event Content

The content of your event is the information that suppliers (participants) see and respond to. For example, typical content might include:

- Line items or lots for suppliers to submit price quotes for or to bid on. Line items and lots can also be organized in sections.
- Text and file attachments for suppliers to view. They can contain introductory and general information, instructions for suppliers, terms of agreement to define your relationship with suppliers, and requirements for suppliers
- Questions for suppliers to answer.
- Prerequisite questions that suppliers must answer.

When creating content, consider these questions:

- What is the best way to get pricing information?
- Do you want to report on the data?
- Does it represent a group of items (a lot, or a section)?
- Do suppliers compete on it or negotiate on it?
- Does this monetary amount need to be included as part of a suppliers total cost?

SAP Ariba Sourcing includes an area called the Content Library where you store content to include in your event. You can also copy content from past events.

SAP Ariba Sourcing enables you to populate content for an RFP event from data that does not conform to any predefined SAP Ariba format by using smart import from unstructured Excel files. For more information, see About Smart Import from Unstructured Excel Files [page 77].

See these sections for details on the event content types:

- Creating Event Questions [page 81]
- Event Lots and Line Items [page 85]
- Event Terms [page 120]
- Historic Price [page 87]
- Event Requirements [page 131]
- Event Attachments [page 131]
- Event Sections [page 134]
- Event Table Sections [page 140]
- Number of Decimal Places [page 158]

SAP Ariba Sourcing also supports **large-capacity RFPs**, which are non-competitive RFPs that can contain up to 10,000 line items. Contents for large-capacity RFPs are accessed using Excel spreadsheets and are not directly visible in the user interface. For information about creating content for large-capacity RFPs, see Using Large-Capacity RFPs [page 508].

About Smart Import from Unstructured Excel Files

Smart import from unstructured Excel file enables you to create content for an RFP event by importing data from an unstructured Excel file that contains one or more sheets including sheets for items, questions, and requirements.

The unstructured Excel file must contain the contents for the RFP event in tables that include a header row. SAP Ariba Sourcing identifies the table structure in each of the worksheets and interprets the data to populate content such as items, questions, and requirements for the RFP event. You can review and revise the mapping from the SAP Ariba Sourcing UI before the populated content is added to the event.

When you import content from an unstructured, multi-sheet Excel file, SAP Ariba Sourcing provides suggestions for mapping the sheets in the Excel file to supported content types:

- Items
- Questions
- Requirements

> ⓘ Note
>
> You can download sample Excel files for single-sheet import, multi-sheet import, and material master import from the **Upload Excel file for smart import** page. Sample Excel files are only for reference and are not meant for enforcing any structure or format.

You can either confirm these suggestions or modify the suggestions as required. If any of the sheets does not render to a direct mapping to a content type, the sheet is marked as a sheet that will not be imported. If you do not agree with the suggestion, you can add the sheet to the import. If you choose to add the sheet to the import, a mapping is assigned to the sheet by SAP Ariba Sourcing. You can confirm or modify the mapping as necessary.

After you confirm the mappings, the contents from the Excel sheet are uploaded to the event and a preview is displayed for your review and confirmation. Note that if you import content to an event, any existing content in the event is overwritten with the new content and is lost.

Depending on the number of sheets and mapping to content type, the preview page contains up to 3 tabs:

- Preview items
- Preview questions
- Preview requirements

If more than one sheet is mapped to the same content type, the imported content is presented in separate sections under the specified content type. After you review the suggested mappings and confirm the mappings, the content is finalized in the event. You can use the **Manage worksheets** option to review and modify the sheet mappings after importing the content.

You can preview the contents that you added to the event and modify mappings of the fields as necessary. When you review the field mappings for an item, you can choose to modify the mapping, mark the mapping as reviewed, or delete the field.

Support for price, reserve price, and historic price enables you to link the price field to the historic price and reserve price fields. Similarly, for quantity fields, you can assign a UOM value or link the quantity field to a column that contains UOM values.

For questions, you can review the mapping, select a column to be assigned as the title; you can also specify the answer type, the required type and the visibility level for the questions. Similarly, for requirements, the contents are imported in a single-column format. You can review the mapping to identify the column that you want to mark as the title.

If you upload an unstructured file that contains simple formulas for any of the line-item terms, such terms are identified as a formula term in the line-item preview. Simple formulas perform one of the following calculation operations: addition (+), subtraction (-), multiplication (*), or division (/). When you review the term, you can retain the formula, create a new term based on the data, or map the data to an existing term. If a term contains a complex formula, that formula is marked as unsupported formula.

You can import content from an unstructured Excel file while creating an RFP event [page 103] or by editing an RFP event that is in draft state [page 113].

Restrictions

The following restrictions apply to smart import from unstructured excel files to create RFP event line items:

- Unstructured Excel file-based import is supported only for the locale *EN*.
- Unstructured Excel file-based import is not supported for sites connecting through Russia Data Center.
- Unstructured Excel file-based import is not supported for the following types of events:
  - Auctions
  - RFI events
  - Large-capacity events
- Excel files of only `.xls` or `.xlsx` formats are supported for import of line-item content to an RFP event.
- The following items are not supported for import from the unstructured Excel file:
  - Sections
  - Multiple tables or content types on the same sheet
  - Mix of content (terms, question, requirements) in the same table
  - Conditions

    - Complex formulas, such as SUM, AVERAGE, and so on, are not supported.
    - Prerequisite questions
- The content to be imported from the unstructured Excel file should be in a simple table format. Data in complex tables are not supported for import from unstructured Excel file.

  > ⓘ Note
  >
  > A simple table contains a maximum of one level of header (row, column, or both), whereas a complex table contains multiple levels of headers (rows, columns, or both). A complex table may also contain merged or straddled cells.

- Importing content from an Excel file to an event replaces any content that was already added to the event.

Best Practices for Creating Event Content

These suggestions help you create simple, understandable content:

- Organize your content logically so it is easy to understand. Use the **Edit** menu (cut, copy, and paste) to rearrange content, or by dragging and dropping.
- Certain content structures complicate scoring. Specifically, SAP Ariba recommendations are to:
    - Always place questions within a section.
    - Avoid creating sections nested many levels deep.
- Phrase questions so that they are obviously questions, and phrase requirements so that they are obviously requirements.
  For example, to ask a question do not say “Number of employees.” Instead say “Please enter how many people you employ.”
- Create your questions to be as quantifiable as possible. Asking questions that solicit numerical facts or a selection from a list of choices, as opposed to vague open ended questions, helps you to get the most value out of your events. For example, scoring compares bids composed of numerical facts. Auctions optimize quantifiable factors such as price or cost.

Creating Event Content Items

Use this procedure to create event content items.

Prerequisites

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)

> ⚠ Restriction
>
> - If you add attachments from an **Add** or **Edit** page for a content item, you can only add one attachment at a time. To add multiple attachments at a time, add attachments from the **Content** page.
> - The list of content items you can add from the **Add** or **Edit** pages for content items is limited to line items, questions, requirements and attachments.

Procedure

1. Click the **Content** tab on the **Event** page.
2. Click **Add** on the **Content** page and choose the type of content you want to create. The **Add** page for the content item opens. For example, if you add a line item, the **Add Item** page opens.
3. Click **Add** on the **Add** or **Edit** content item pages. For example, if you add a requirement, after you entered applicable values, click **Add**, which adds your new requirement and allows you to add a line item, a question, another requirement, or an attachment without having to return to the **Content** page to add other content items.

Results

The new content item is added as follows:

- If you add a new content item from the **Add** page for a content item, the new content item is added to the end of your content item list.
- If you add a new content item from the **Edit** page for a content item, the new content item is inserted after the item you edited. This allows you to quickly add new content in the right order.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]

Event Attachments [page 131]

Types of Event Content

Topics describing the different types of content you can add to a sourcing event.

Creating Event Questions

Use this procedure to create event questions. You use questions to solicit information from event participants. A response can be text, a numeric value, an attached file, a money value (amount and currency), a date, or a quantity (number and unit of measure).

Prerequisites

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)

> ⚠ Restriction
>
> Participants can see only the content to which they are invited. If a participant is not invited to participate in a particular section, that content is not displayed in any Microsoft Excel spreadsheet used to show the contents, including surveys.

Context

You can set options to create:

- Multiple-choice questions that present participants a dropdown with possible responses.
- A limited range for a response.
- Prerequisites, which are questions that suppliers must answer before seeing event contents or submitting responses. You can also configure a prerequisite so that an event owner must approve a supplier's response for the supplier to continue.
  Participants see prerequisite questions and are prompted for responses during the **Review and Accept Prerequisites** phase, before they select lots for bidding.
  Regular questions (not prerequisite questions) are displayed to participants when they enter the event.
- Internal-use questions to solicit information from event owners that aren't visible to participants.

You can also create questions with a form or spreadsheet file for participants to complete. Specify **Attachment** as the answer type and upload the file as the initial value.

Procedure

1. On the **Content** page, choose **Add** > **Question**.
2. Enter your question in the **Name** field.

   Include hints for event participants. If you want participants to respond with certificates or attachments, enter text to tell participants to upload a certificate or attachment. For example: "Upload a CAD drawing of your part."
3. To create a prerequisite question, select the appropriate choice for the **Is this a prerequisite question to continue with the event?** field.

   See Prerequisite Questions [page 84] descriptions of the choices.

   The default value is **No** (create a regular question, not a prerequisite question).

4. **Optional:** If your organization sends award data to an external system and you want to include responses to this question from awarded participants in the award data, create a name for the response in the **ERP field mapping** field.

   You cannot use the same response name for any other question in this event (each name must be unique in an event). SAP Ariba Sourcing uses the name in the **ERP field mapping** field as the `name` attribute of the extrinsic that contains the response in the `QuoteMessage` document it sends to the external system. For more information about `QuoteMessage` documents, see cXML Solutions Guide.
5. In the **Answer Type** field, select the type of response you want the participant to provide.

   Answer types include text, numbers (integers), decimal numbers, percentage, quantity, money values, Boolean values, dates, addresses, and file attachments.. For text answers, you can choose **Text (single line limited)**, **Text (single line)**, or **Text (multiple lines)**. **Text (single line limited)** responses are limited to 255 characters; **Text (single line)** responses are limited to 4000 characters; and **Text (multiple lines)** have no length limit.

   If you want a single-line text response, SAP Ariba recommends that you use the **Text (single line limited)** answer type. **Text (single line limited)** responses are stored in in locale-independent database fields, which ensures a uniform view of responses if participants from the same supplier (supplier organization) submit responses from different locales.

   For additional information and descriptions of answer types, refer to Question Answer Types for Supplier Forms and Questionnaires.
6. In the **Acceptable Values** field, choose if you will allow participants to enter **Any Value** or constrain the values they can enter.
   - You can create a multiple-choice question for numeric, single-line text, date, or money responses. To create a multiple-choice question:
     - Select **List of Choices** for **Acceptable Values**. A **List of Choices** area appears at the bottom of the page.
     - Enter a choice and click **Add**. Continue adding choices as needed; there is no limit to the number of choices you can add.
     - To include a choice labeled **Other** that allows participants to type their own response, choose **Yes** for **Allow participants to specify other value?**.
     - To allow participants to select multiple choices, choose **Yes** for **Allow participants to select multiple values?**.
   - You can create a question that accepts numerical responses within a limited range for questions with numeric, date, or quantity responses. To create a question that accepts a limited range of responses:
     - Select **Limited Range** for **Acceptable Values**. A field, **Range**, appears at the bottom of the page where you can enter the range of acceptable values.
     - Enter minimum and maximum values for the range.
7. **Optional:** To create an internal-use question visible to event owners only, set the option **Visible to Participant** to **No**. You can also set the option **Response Required** to **Yes, Owner Required**.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
About Conditional Event Content [page 166]

Creating Event Content Items [page 79]

Prerequisite Questions

Prerequisite questions can prevent suppliers (participants) from accessing the event or submitting a response until they have provide satisfactory answers. To create a prerequisite question, select one of the following options in the **Is this a prerequisite question to continue with the event?** field when creating an event question:

Prerequisite Question Options	Description
No	The question is not a prerequisite for an event content.
Yes, and no restriction	The question is a prerequisite, but there are no restrictions for suppliers to first answer the question.
Yes, with an access gate on event con-tent	The question serves as an access gate question. Suppliers are required to answer the question first in order to gain access to the event. If owner review of the response is required, then suppliers cannot continue with the event until you have accepted their response. If you are designing your event with access gate questions, you can hide content from suppliers until they have cleared the access gate. Set **Visible to Participants** to **Yes, after access gate is cleared** for all content items you want to hide until participants are allowed into the event. If you have access gate questions, but no content is set to be hidden, then participants can see the event content even if they have not cleared the access gate. ⓘ Note If you hide event content until prerequisites are met, the event headers may still be visible to suppliers (participants). If suppliers download content into a Microsoft Excel spreadsheet during the event, only the content that is visible to them is downloaded. Suppliers (participants) need to download the content again after they cleared the access gate to get a full report of the event content.
Yes, restricting response submission	The question serves as a participation gate question. Suppliers (participants) are required to answer the question first in order to be able to submit a response or bid. If owner review of the response is required, then suppliers cannot enter responses to the event content until you have accepted their prerequisite response. If suppliers download the content into a Microsoft Excel spreadsheet during the event, they cannot import their responses until the they have cleared the participation gate.

ⓘ Note

- These prerequisite questions apply only to Classic Sourcing. For Guided Sourcing, see Adding Questions and Prerequisites to Guided Sourcing Events.
- Prerequisite questions are not supported in Surveys (Quick Surveys or Project Surveys).

You monitor, accept and reject responses to prerequisite questions on the **Content** tab of the event monitoring interface.

You can convert existing attachments and requirements into prerequisite questions, if required.

Related Information

Editing and Monitoring Events [page 421]

Event Lots and Line Items

You can use lots and line items together to collect pricing information in sourcing events.

A line item is the smallest entity that suppliers (participants) can submit pricing for or bid on. Line items have these special characteristics:

- A line item is an individual part or service that has an associated price.
- You can use line items to specify distinct products by their unique identifier, such as a manufacturer's part number or SKU.
- Line items do not have to be inside lots.
- A line item always has an associated quantity, for example, 50 items, 10 lbs., or 8 hours.
- You can specify line item terms whose values roll up to the lot level and show as a sum.
- A line item can only be awarded separately when it is outside a lot.

Lots are usually composed of one or more line items. Lots have the following characteristics:

- Lots are optional; you can have line items that are not in lots. You can also have lots with no line items.
- The price of a lot is the combined total of all the items in the lot.
- Lots always count toward the maximum number of elements in your event.
- Bids for lots are always on the extended price or the total cost.

Consider the following points about lots and line items when planning your event:

- When you list items separately, instead of grouping them into a lot, suppliers might give you better prices, because they can bid at a more granular level than if they bid on a lot (or group) of items.
- By adding content as a line item (whenever possible), you can take advantage of supplier's ability to give you a price break on selected items.
- Alternatively, you might be able to get a better price from suppliers if they can give discounts when they get business across all lines in the lot.

How Lots and Line Items Affect an RFP or Auction

During an event, SAP Ariba Sourcing presents participants with a list of lots under **Choose Lot** to the left of their console. Participants progress through the lots in a linear fashion. In a staggered auction, each line in the **Choose Lot** list closes a few minutes before the next line, focusing attention sequentially on each line just before it closes.

When line items are created outside of a lot, SAP Ariba Sourcing places the line items into the **Choose Lot** list separately. In a staggered auction, each line item receives the focus of the auction for a period.

When line items are created inside of a lot, SAP Ariba Sourcing places the line items in the **Choose Lot** list together. In a staggered auction, suppliers bid on them simultaneously. They do not individually receive the focus of the auction.

Organizing your auction correctly into line items and lots is an important factor in having a successful auction.

Types of Lots

The following table defines the different types of lots. For a lot type to be available when creating a project, it must have been added to the project template. In the template, you can only have one lot of each type, so the options that appear are for the types that do not yet exist in the template.

Lot Type	Description
Item Lot: Bid at Item level, compete at lot level (collect item pricing during bidding)	This type of lot allows you to collect line item pricing during bidding. This option typically means more competitive pricing. However, the participants must enter much more information. If there are many items in a lot it might be hard for them to enter so much information during the event.
Basket Lot with Items: Bid at lot level, compete at lot level (collect item pricing post bidding)	SAP Ariba Sourcing displays the line items in the lot, but participants cannot enter prices for line items, only for the entire lot. You use this lot type if you have many line items in a lot. It saves participants time and is easier for them. The bids are always on the extended price or total cost. When the event is finished, suppliers fill in the individual line item prices in a process known as Lot Reconciliation. Be sure to examine the item prices before you make your awarding decision in case participants raised some prices while lowering others to get a better lot price.
Basket Lot: Bid at lot level, compete at lot level (do not collect item pricing)	Choose this if you do not want to collect line item pricing information for your lots. You cannot add line items to this type of lot. The bids are always on the extended price or total cost.
Bundle Lot: Bid discounted value at item level, compete at lot level (collect item pricing during bidding)	This is for buyer bundle lots. A bundle is a container into which the project owner can create copies of line items. These line items can have a different price when sold as part of the bundle. A bundle lot is different from a supplier bundle, which allows suppliers to bundle items into lots and then submit bids for these lots.

Related Information

Event Content Limits [page 26]
Bundle Lot [page 90]
Envelope Bidding with Alternative Bids for Lots and Service Items [page 226]

Ceiling/Floor/Initial Price

A ceiling price is the highest price that participants can bid for a line item in a reverse auction. In a forward auction, it is the floor, or lowest price. In a Dutch Auction, it marks the last price before the event closes.

It is the initial or starting bid in all types of auctions, including Dutch. The value you enter in an item/lot Price field becomes the ceiling/floor price. Leave it empty if you do not want to set one, except in a Dutch auction, where it is required.

For a reverse auction, for example, the system displays the ceiling price in the participants' bidding console. If they try to submit a bid higher than the ceiling, SAP Ariba Sourcing displays an error.

You can also set a floor price participants cannot bid below. You can use a floor value to prevent bidders from bidding zero. You do not want to set an initial price of Zero in a Dutch reverse auction if the price adjustment is a percentage, or the price and the adjustment remain zero.

You can set participant–specific ceiling prices, meaning, a different ceiling value for each participant. To set these values, in the Item Terms area, click **Set Participant–Specific Values**, and enter the prices in the **List of Invited Participants** area.

The system enforces ceiling prices for both RFPs and Auctions. This concept does not apply to RFIs; the system does not enforce ceiling prices for RFIs.

If you allow prebids during the preview period of your RFP or Auction, the system enforces any bidding rules that you defined, such as not allowing tie bids, or having a ceiling price.

If you want to have a ceiling price during the main bidding, but not during the preview period, leave the ceiling price field blank when you create and publish the event. Then, during the prebid review period, set the ceiling prices. You can choose whether to discard any bids above the new ceiling price when you update the event.

Related Information

List of Invited Participants [page 90]

Historic Price

The system uses historic prices to calculate your savings or, for a forward auction, earnings. Enter the price that you paid for the item or service you are sourcing with the line item, the last time you sourced it. When suppliers enter their bids, the system automatically calculates the savings you achieve. Historic prices are typically required for any lot or item that you add.

Reserve Price

The reserve price is the price at which it begins to make sense for you to award your business to a new participant and they help to manage participant expectations. They understand that you may not award business to bids that do not meet or improve on your reserve price.

The **Market Feedback** event rule **Show reserve price to all participants** specifies if the reserve price is visible participants. For additional information about this rule, see Event Rules Reference Guide.

Decimal Precision

The **Set Decimal Places** button enables you to edit the number of decimal places for line items, lots, and questions in the event, individually or globally. The button is located at the bottom of the Terms area, to the right of the other buttons.

If you enter a number with more decimals places than the set precision, SAP Ariba Sourcing automatically rounds the number down for RFPs and Auctions and rounds the number up for Forward Auctions. For example, if you enter 5.167 and the precision is set to two decimal places, SAP Ariba Sourcing rounds the number down to 5.16 in RFPs and Auctions to ensure you receive the lowest price. SAP Ariba Sourcing rounds the number up to 5.17 in Forward Auctions to ensure you receive the highest selling price.

Related Information

Number of Decimal Places [page 158]

Commodity

Your company might refer to commodities as categories, UNSPSC codes, or by some other terminology. Complete this field to allow your organization to sort your purchases.

Your site can be configured to make this field a required field, which forces the project owner to fill in a commodity code for every line item.

Bid per Unit / Bid All Units

Choose **Participants bid per unit (unit bidding)** to cause participants to enter their bids for the item price. The system multiplies the item price by the quantity, and adds in the effect of any cost formulas, to calculate the extended price and savings fields.

Choose **Participants bid on all units (extended bidding)** to cause participants to enter their bids for the extended price. The system divides by the quantity to calculate the item price. There is no particular strategy in making this choice; choose the option that is most convenient for your participants.

> ⓘ Note
>
> Click an **Fx** link in a table to display the formula used to calculate the value at that location.

Bidding Rules

In an auction event, you can define bidding rules for lots and line items with the following values:

- **Improve bid amount by**: This rule shows the value specified on the Rules page for the **Improve bid amount by** rule: it can either be percentage or nominal amount. To change it, change the rule setting.
- **Bid decrement**: Define how much participants must improve their own bids (in nominal amount or percentage) before being allowed to resubmit.
  The Bid Decrement specifies percentage or amount that each participant must improve their own bid. Setting the bid decrement correctly is important. Generally, participants improve their bids by the smallest amount possible. If the bid decrement is too small, the auction progresses too slowly.
  If the bid decrement is too large, you may lose potential savings. Each participant has an absolute best price beyond which they cannot improve. If a seller's best price is $550, and the bid decrement is $100, they might stop at $600. They can't go to $550 because it does not meet the decrement requirement and $500 is too low for them. You therefore might end up buying at $600 instead of $550.

  > ⓘ Note
  >
  > The following conditions must be met before SAP Ariba Sourcing displays the Bid Decrement functionality to participants:
  > - Items must have at least one visible term.
  > - The specified visible term is not be a formula.
  > - The rule, **Will Participants Compete on This Term?** is set to **Yes, Downward bidding**.

- **Protect the lead bid with front buffer / back buffer**: This option appears when the rules "Must participants improve their bids" and "Create a buffer to protect lead bid" are both set to **Yes**. Define a buffer around the lead bid (in nominal amount or percentage) that defines how closely other bidders can approach. The system rejects bids placed within the buffer.

  > ⓘ Note
  >
  > If event rules are configured to hide the lead bid from participants (**Show participant responses to other participants** and **Show lead bid to all participants** are set to **No**) and you set a buffer for lead bids, a participant might place a bid within the buffer and, not knowing the lead bid, have to keep submitting bids until they exceed the buffer and their bid is accepted.

- **Can participants submit tie bids**: Set this to **No** if you do want to prevent a participant from submitting a bid that is the same as another bidder.
- **Show traffic light bidding icons for this lot or item**: Choose **Yes** to show suppliers a green, yellow, or red traffic light icon during bidding for this lot or item.
  - **Show the green traffic light icon for the best bid only**: Choose **Yes** only show the green traffic light icon to the supplier with the best bid.
  - **Show the green traffic light icon when bids are this value or lower**: Suppliers see the green traffic light icon when they submit a bid at this value or lower.
  - **Show the yellow traffic light icon when bids are this value or lower**: Suppliers see the yellow traffic light icon when they submit a bid at this value or lower.
  - **Allow participants to submit bids by email**: Enables mail bidding so participants can respond to RFQs or submit bids for single-item events via email. You can use email bidding with the guided buying capability in SAP Ariba Buying and allow unregistered suppliers to submit email bids

Certain bidding rules apply only to specific lots or line items. Configure them when creating or editing a lot or line item. Ceiling prices are also a form of bidding rule.

Related Information

Ceiling/Floor/Initial Price [page 86]

List of Invited Participants

If you want to exclude invited participants from specific line items, you can select the participants from the line items and click **Remove**. In this area you can also set participant-specific values for line item terms. Depending on the term, participant-specific values have different functions. For example, cost terms for each participant have different values because your total cost to buy from each participant is different. For pricing terms, the initial value can be the default value (the value that the participant sees when first signing in to your event), the ceiling value (the highest acceptable value for the line item), or both.

The **Set Participant–Specific Values** button turns on participant specific values for the price term. To set participant specific values for other terms, edit the term and enable the rule **Use participant–specific initial values**.

Item Terms

Item terms are line item elements to which you assign a numerical or string value. Line items can contain various numerical terms that roll up to a line item price as well as string values, or string values that map to numbers. Terms that are populated with data from an external system can be read-only.

Related Information

Event Terms [page 120]

Bundle Lot

The lots described as "Bid discounted value at item level, compete at lot level (collect item pricing during bidding)" are a bundle lot. A bundle is a set of items that cost less when they are bundled with other items. Bundles are useful when you want to give event participants an opportunity to give discounts not just for volume by item, but for the collection of items. For this type of lot to be available for an SAP Ariba Sourcing project, it has to exist in the event template that the project is using.

You have to click the name of the bundle lot and click **Add**. The item in the bundle becomes a copy of the original and it can have a different price than the same item outside the bundle or the same item in another bundle.

Whether participants can create bundles is independent of project owners creating bundles and is controlled by the rule **Can participants create bundles?**. A bundle lot does not have to exist in the event template for suppliers to create their own bundles under this rule.

> ⓘ Note
>
> - When you define terms for items in a bundle lot, you have to decide which term the participant can change. Generally it is the price. Since most terms are not editable, the default is **Not Editable**, so do not forget to make at least one term editable by the participant. You can enable editing by specifying the value for the **Is term editable in alternatives?** field in line item terms. You can set the value to **Editable by owner and participant**.
> - It is helpful to create an item definition in the template for this event, so that the editable term is preset and the project owner does not need to set it for each item.
> - There is no standard event template called Extended Reverse Auction template. However you can use the **Reverse Auction** template and extend it to bundles. You can make the bundle lot available in other templates by adding this lot type to the template's **Content** page.

Creating Lots in Events

Use this procedure to create lots in events.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Lots are usually composed of one or more line items. It is possible to have a lot with no line items and line items that are not in lots.

Procedure

1. On the **Content** tab of the **Event** page, choose **Add** > **Lot**.
2. Select the type of lot.
3. Fill in the fields that apply.
4. Click **OK**.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Event Lots and Line Items [page 85]
Creating Event Content Items [page 79]

Creating Line Items in Events

Use this procedure to create line items in events.

Prerequisites

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)

> **Restriction**
>
> Only the content a supplier (participant) is invited to participate in is visible to them. If a supplier is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

A **line item** is the smallest entity that a supplier (participant) can submit prices for or can bid on. It has a unique identifier, such as a manufacturer's part number or SKU. When you add a line item to your event, you enter the quantity associated with the item that you want to buy.

Line items can specify a quantity that you can split between suppliers when awarding, or during bidding, for some auction types. Correctly organizing your event into line items and lots is important for a successful auction.

For more information about line items, see Event Lots and Line Items [page 85].

Procedure

1. Navigate to the **Content** tab of the **Event** page.
   - To manually enter information for an item, select **Add** > **Line Item** and fill in the terms and other field information.
   - To select an item from material master data, select **Add** > **Content From Item Master Data**. (This option is available only if your site has item master data imported from an external system.)
     Enter search terms and click **Search**.
     In the search results, click the check boxes for the items you want to add. Click **Copy**.

   > **Note**
   >
   > If you want to send award information for this item to an SAP ERP, one of the following conditions must be met:
   > - This event was created from a contract request that originated from an SAP RFQ using the "SAP RFQ and Award Integration with SAP Ariba Sourcing" feature.
   > - This is an item from material master data (added by selecting **Add** > **Content From Item Master Data**) and your site is configured to use the Award Integration Using Material Master Item Data feature.
   > - This is not an item from material master data, but values are specified in the **Item Category** and **Material Group** fields and your site is configured to use the Award Integration Using Material Master Item Data feature.

2. Click **OK**.

Next Steps

Members of the Integration Protected Fields Editor group can modify item master data after it is added to an event. 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.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Event Lots and Line Items [page 85]
Creating Event Content Items [page 79]
Item Master Search Filters [page 94]

Item Master 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.

Setting the Decimal Precision in Event Line Items and Lots

Use this procedure to set the decimal precision in event line items and lots.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Lots are usually composed of one or more line items. It is possible to have a lot with no line items and line items that are not in lots. You have the following options when setting the decimal precision in line items and lots:

- **Change the number of decimal places for this item only:** Choose this option to set the precision for only the lot or line item that you are currently editing.
- **Change the number of decimal places for all content:** Choose this option to set the precision for all lots, line items, and questions (with terms of type Money, Decimal Number, or Percentage) in the event. This is superseded individually by any items that have an their own setting.

Procedure

1. Create or edit a line item or lot.
2. In the **Terms** area, click **Set Precision**.
3. On the **Set Precision** page, enter the number of decimal places that you want to use.
4. Choose which content to apply the specified precision.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Types of Item Term Fields [page 122]
Creating Event Content Items [page 79]

Creating Content for Email Bidding

Use this procedure to create content for email bidding. Email bidding enables participants to respond to events through email. You can create single-item events or multi-item event that use Excel file-based bid sheets. You can use email bidding with the guided buying capability in SAP Ariba Buying and allow unregistered suppliers to submit email bids.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

> ⓘ Note
>
> This feature is disabled by default.
>
> - To be able to create events that use Excel file-based bidding, the ICM parameter `Application.ACM.EmailBiddingWithStandardExcel` must be enabled in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**. For more information, see Enable email bidding with standard Excel bid sheet.
>   If the ICM parameter is not enabled and if you want to enable email bidding only for single-item events, have your Designated Support Contact log a service request to enable the following feature toggle on your site:
>
>   EmailResponse (Email Response to RFQ)

Context

Email bidding enables participants to respond to single-item RFQ events through email or to multi-item RFP or RFI events through a bid sheet Excel file over email.

You can also use email bidding with the guided buying capability in SAP Ariba Buying to create RFQ events. In addition, you can use this feature with SAP Business Network light accounts and guided buying to allow unregistered suppliers to quickly participate in an RFQ.

> ⓘ Note
>
> When email bidding is used, the bidder agreement is provided to the supplier as a read-only Word document attachment to the event invitation email. By submitting a response to the event, the supplier agrees to and accepts the terms specified in the attached bidder agreement.
>
> If a term has **Visible to Participants** set to **Yes, after access gate is cleared**, the term is not shown in the invitation. Terms that allow responses with **Visible to Participants** set to **Yes, after access gate is cleared** are shown in the response email but without any initial values for the term.
>
> If your site has the parameter `Application.AQS.RFX.HideContentUntilAgreementAccepted` enabled, the bid will be visible to the supplier. To hide the bid from the supplier, disable the parameter and set **Visible to Participants** setting to **Yes, after access gate is cleared**.

Email bidding has the following restrictions:

- The following restrictions apply to both email bidding using Excel and email bidding for single-item events:
  - Participants can submit only one response; the response is sent using a one-time token. Event features that use multiple participant requests, such as alternate pricing and traffic light auctions, are not supported. Suppliers can revise the response by clicking the **Revise response** link in the confirmation mail they receive when a response is successfully submitted.
  - Event features that use complex content formats, such as matrix pricing, large-capacity events, and custom offline response sheets, are not supported.
  - The type of currency for **Price** and any other money terms is determined by the **Currency** field in the event header. Participants cannot select the bidding currency and currencies are not converted. SAP Ariba discards any text to indicate a currency type or any other non-numeric characters in responses for money terms.
  - You cannot customize notifications for email bidding.
- The following restrictions apply to Excel file-based email bidding:
  - Excel file-based email bidding is available for only the RFI and RFP sourcing event types.
  - Excel file-based email bidding is available for only sourcing events with standard-capacity line items.
  - Excel file-based email bidding does not support multi-currency. Bids are assumed to be submitted in the currency of the sourcing event.
  - Excel file-based email bidding does not support events that have alternative bidding enabled; events that contain conditional questions and conditional content; events with large-capacity line items; and competitive events.
- The following restrictions apply to email bidding for single-item events:
  - A single-item event cannot contain more than one line item.
  - Questions and responses cannot contain a colon (**:**). Colons are used to indicate the start of a participant's response.
  - Only one question or term can require a response that is an attachment.
  - Attachments added as **Reference Documents** are not sent to participants. To include an attachment in the notification sent to participants, add a question with the **Answer Type** set to **Attachment** and upload the attachment in the **Initial Value** field.
  - Questions and terms cannot have **Certificate** for the response type. Responses in email bids cannot be certificates.

Procedure

1. If you are editing an event template or an event for which the template author has delegated the configuration for email bidding, navigate to the **Rules** for the event. In the **Bidding Rules** section, select **Yes** for **Allow participants to submit bids by email**.
2. Edit the event content.

   > ⓘ Note
   >
   > If you are not using the Excel file-based email bidding, do not create content with more than one line item.

→ Tip

When you create email bidding events, you might want to provide instructions with the response format requirements specific to email bidding. Consider creating a question that does not require a response and enter the instructions in the **Name** field.

If you are creating single-item events, alternatively, you can upload a document with instructions and include the document as an attachment.

If you want participants of single-item events to include an attachment in the response, consider creating a question as follows:

- In the **Name** field, include text that tells participants to attach a document in the response. For example, **You must attach a document with tax codes.**
- In the **Answer Type** field, select **Attachment**.
- In the **Response Required** field, select **Yes, Participant Required**.
- If you want to include a document for participants to use as a template for their response, upload a document in the **Initial Value** field.

→ Tip

When an invite is generated for an email bidding event, documents such as questions, requirements, and item description documents that you uploaded to the event are compressed into a .zip package and added as an attachment to the event invite email along with the bid sheet as an Excel spreadsheet and the bidder agreement as a Word document. By default, the maximum permissible file size for all the attachments together is 10 MB. You can increase the size of the attachment to a maximum of 25 MB by configuring the ICM parameter `Application.AQS.EmailBidAttachmentSizeLimit`.

Adding a Plant to an Article on the Article Master Search Results Page

Use this procedure to add a plant to an article.

Context

When you add an article without selecting a plant, the article is added without a plant to the event or contract.

If no plant is associated with an article, the **Plant** column on the search results page for that article is empty, but it can be copied to a sourcing event. If a plant or plants are associated with an article, a **n of n selected** link is displayed in the Plant column to indicate this. (For example, this link might say “0 of 2 selected”, meaning that two plants are associated with the aricle in article master, but none have been selected for the purpose of the current sourcing event.) You can click on this link to add or change the plants that are selected for the article.

Procedure

1. Sign in to your SAP Ariba solution.
2. Select **Create** > **Sourcing Project** .
3. Enter the required details for the project, select the appropriate template, and click **Create**.
4. On the **Content** tab, select **Add** > **Content From Article Master Data** . (This option is available only if your site has article master data imported from an external system.)
5. Search for an item.
6. On article master data search results page, select the **n of n selected** link in the **Plant** column.
7. Select one or more plant(s) and then select **Done**.

   The article is selected automatically and added to the cart.
8. (Optional) You can select the cart icon and click on the **n of n selected** link to change the plant selections for an article.
9. Click **Copy** on the search results page to copy the selected articles to the sourcing event.

   If there is an article to which you added multiple plants, a separate line item is added on the sourcing event for each plant selection.

Creating Sourcing Event Lot or Line Items for Multiple Plants

You can duplicate an item or lot across multiple plants at the same time. So you can create a line item that can be priced for multiple plants simultaneously. For example, you might want to get prices for a single item, such as “large peperoni pizza” in five different regions simultaneously. This allows you to get visibility on price differences between different regions.

The availability of matrix term functionality for the Plant term in line items and lots in contract workspaces and sourcing events means that the Plant term can have a selection of multiple of values to choose from. This list comes from the master data set that is loaded to your SAP Ariba system. For example, you can have a single line item or lot listed multiple times in a sourcing event or contract workspace, with each iteration requesting a price for or relating to a different plant. This is done by adding a Plant term to the lot or item, or editing an existing Plant term, and making that plant term a matrix term.

You can add Matrix term functionality to the Plant term in a lot or item at template level, or you can define the matrix term directly in a lot or line item within an individual contract workspace or sourcing event.

Adding a Sourcing Event Lot or Line Item for Multiple Plants

Use this procedure to add a sourcing event lot or line item for multiple plants.

Procedure

1. On the SAP Ariba solution Home Dashboard, select **Create** > **Sourcing Project**.
2. Complete the necessary project fields.

   When creating a sourcing event or contract workspace you must select an external system that contains plant master data.
3. Select **Add** on the **Content** tab and then select one of the following options from the pull-down menu:
   - **Lot** - go to step 5
   - **Line Item** - go to step 5
   - **Content From Item Master Data** - go to step 4
   - **Content From Article Master Data** - go to step 4
   - **Items From Library** - go to step 4
4. Search for an item or lot and add it to the event.
5. Complete the required item or lot fields, including adding a region.
6. Under **Item Terms**, select **Add** > **Term**.
7. Select the **Plant** term from the **Source Type: System Global** list and select **OK**.
8. Select the **Plant** term in the line item or lot and click **Edit**.
9. Select the following settings for the Plant term:
   - **Response Required** = Yes, Owner Required
   - **Visible to Participant** = Yes
   - **Is this a matrix item** = Yes
   - **Display item in column or row** = Column
10. Click **OK**.
11. Complete the line item or lot fields and select a plant for the item or lot in the **Plant** field, then select **Done**.
12. Select the line item or lot and click **Edit**.
13. Under **Matrix Factors**, select **Add** and add additional plants for which you want to get prices for the item or lot.

    You can select and add multiple plants in a single action. Plants that are added as matrix factors already are listed as read-only on the **Add more plants** page, and they cannot be selected.
14. Complete and publish the event.

Results

In the sourcing event, the supplier sees a separate line item or lot row for each plant selection.

Importing Content from an Unstructured Excel File While Creating an RFP Event

Use this procedure to import content from an unstructured Excel file while creating an RFP event. SAP Ariba Strategic Sourcing Suite enables you to import content to an RFP event from an unstructured Excel file. To import different content types, you can use a multi-sheet Excel file. You can do smart import of content from unstructured Excel while you create an event or while you edit an event that is in draft state.

Prerequisites

- You must be the event owner or have project owner capabilities for the event.
- Ensure that the the automated scheduled task **AutoMLModelGenerator** has run at least once for the site. If not, run the scheduled task **SourcingUnstructuredMLModelGenerator** for generating the model.
- Ensure that the Excel file from which you want to import line items for the RFP event is available at a location that you have access to.
- Ensure that the first row of each Excel sheet contains the header information. Note that the first row of the table is always interpreted as the header row.
- Ensure that the currency format in the Excel file is the same as that is specified in the event.

Context

You can choose to create a sourcing project that uses smart import from unstructured Excel file by setting the **Smart import from Excel** option to **Yes**. Alternatively, you can edit an event and import content from an unstructured Excel file.

Procedure

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

   > Note
   >
   > Alternatively, you can open a sourcing event that is in draft state and click the *More actions* (three vertical dot) icon and click **Import content from Excel**. From the **Choose import method and upload file** popup, click **My own format (use smart import** option.
   >
   > The **Upload Excel file for smart import** page appears. Skip steps 2 through 6, and go to Step 7.
   >
   > > Caution
   > >
   > > If you import content to an event, any existing content in the event is overwritten with the new content and is lost.

The **Create Sourcing Project** page appears.
2. Enter a name for the event.
3. From the **Event type** dropdown list, select **RFP**.
4. From the **Smart import from Excel** options, select **Yes**.
5. Click **Create**.

The **Upload Excel file for smart import** page appears.
6. From the **Drop a spreadsheet, or browse**, click browse and locate the `.xls` or `.xlsx` file that contains the unstructured data. Alternatively, you can drag and drop the `.xls` or `.xlsx` file to the area marked as **Drop a spreadsheet, or browse**.

> ⓘ Note
>
> To view sample Excel files, click the **Click to download example spreadsheets** link and download a sample spreadsheet. You can download a single-sheet, multi-sheet, or material-master spreadsheet.
>
> Note that these sample spreadsheets are for reference purpose only and are not meant for enforcing any particular structure or format.

The **Manage worksheets** popup displays the system-generated mappings for the sheets in the uploaded workbook. Sheets are mapped to the most-relevant content type based on the content on the sheets. If no matching content type is identified, the sheet is listed under the **Sheets that will not be imported**.
7. Review the sheet mappings in the **Manage worksheets** popup. For information about reviewing the sheet mappings, see Managing Sheet Mappings [page 105].

> ⓘ Note
>
> You can have more than one sheet mapping to the same content type. If you import content from more than one sheet to a content type, content from different sheets are shown as sections.

The *Preview* page appears.
8. From the **Preview items** tab, review the item-level mappings and make the necessary modifications. For information about reviewing item-level mappings, see Reviewing Item-Level Mappings [page 106].
9. From the **Preview questions** tab, review the mappings for the questions.

For more information about reviewing questions, see Reviewing Mappings for Questions [page 107].
10. From the **Preview requirements** tab, review the requirements.
    a. Click the three-vertical-dots icon to view the title mapping for the requirement. You can modify the mapping and select the column that you want to appear as the requirement title.
11. After you complete the review, click **Import to draft event**.

> ⓘ Note
>
> The number of columns, items, questions, and requirements supported for import depends on site-level configurations. If you receive an error message that states any of these values exceeds the maximum limit, remove the entries to ensure that the spreadsheet contents are within the supported limits. To increase the maximum supported limit, contact your site administrator (Customer Administrator).

Managing Sheet Mappings

From the **Import data from a spreadsheet** page, use this procedure to upload the spreadsheet that contains the content that you want to import. After you upload the spreadsheet, the **Manage worksheets** popup appears.

Context

The **Manage worksheets** popup displays the system-generated mappings for the sheets in the uploaded workbook. Sheets are mapped to the most-relevant content type based on the content on the sheets. If no matching content type is identified, the sheet is listed under the **Sheets that will not be imported**.

Procedure

Review the sheet mappings in the **Manage sheets** popup.

a. If any mapping is incorrect, modify the mapping by selecting the appropriate content type from the drop-down list.
b. If you want to exclude a sheet from the import, click the *delete* icon to move the sheet to the **Sheets that will not be imported** list.
c. If you want to include a sheet from the **Sheets that will not be imported** list to the list of **Sheets that will be imported**, click the **Include this sheet** link next to the name of the sheet that you want to add to the import.
d. Review the mapping of the sheet you added to the **Sheets that will be imported** list and make any modifications as necessary.
e. Click **Confirm**.

> ⓘ Note
>
> You can have more than one sheet mapping to the same content type. If you import content from more than one sheet to a content type, content from different sheets are shown as sections.

The *Preview* page appears.

Reviewing Item-Level Mappings

When you do smart import from an unstructured Excel file, SAP Ariba Strategic Sourcing Suite provides mappings suggestions for the items and terms (columns) in the Excel file. Use this procedure to review the item-level mappings.

Context

From the **Preview items** tab, you can review the system-generated mappings and make the necessary modifications.

Procedure

1. From the **Preview items** tab, review the imported items and the system-generated mappings for the items.
2. (Optional) If you want to modify the item-level mappings, click the more icon (▫▫▫ available next to the item name in the item row.
   a. Click **Edit item**.
   b. From the **Edit item** popup, select the item in the **Map to Existing item** dropdown that you want to map the item from the Excel document to.
   c. Click **Apply**.
3. (Optional) If you want to modify the item header, click the more icon (▫▫▫ icon in the first column.
   a. From the **Edit item details** popup that appears, select the column linked to the item. By default, the item is mapped to **Item Name**column. You can select the column that contains the item header information.
4. From each of the remaining column headings, click the more icon (▫▫▫ to view the review options popup menu.

   The review options popup displays the options **Edit**, **Mark as reviewed**, and **Delete**.
5. (Optional) If the mapping is correct, click **Mark as reviewed** to confirm the mapping.

   The **Mark as reviewed** option changes to **Mark as needs review**.
6. (Optional) If you want to exclude the field from the import, click **Delete**.

   The **Delete** option changes to **Add**. You can click **Add**, to include the field in the import.
7. (Optional) If you want to modify the term mapping, click **Edit**.

   The **Edit** *termname* popup appears.
8. You can make the following updates from the **Edit** *termname* popup:

   - Create the team as a new term (select **New term** from the **Create as** dropdown).
     The name from the imported Excel file appears as the display name.
     You can specify the **Required type** and **Answer type**.
   - Map the term to an existing term (select **Existing term** from the **Create as** dropdown).

   > → Tip
   >
   > If the template contains mandatory terms, we recommend that you complete the mapping for those terms before you finalize the import.

> ⓘ Note
>
> If the imported spreadsheet contains a term that is the same as a term in the template, and if the term in the spreadsheet is mapped as a custom term, the import fails because of the duplicate, unresolved entries in the template and the spreadsheet.

Select an existing term from the **Map to an existing term** dropdown.
You can select the display name from the name in the imported Excel file and the name of the existing field to which the term is mapped.
The required type and answer type settings depend on the existing term to which the term is mapped.
If you map the term to **Price**, you can also select **Reserve price** and **Historic price** terms from the available columns in the imported Excel file to link the price term.
If you map the term to **Quantity**, you can choose the UOM for the term. You can either select one from the **UOM** dropdown or link to a column in the imported Excel file.

> ⓘ Note
>
> If you choose to link the **Quantity** field to a column for UOM values, ensure that the column contains valid UOM entries. If the column does not contain valid UOM entries, the smart import fails.

- If you are importing data for a competitive event (like auction events in guided sourcing, RFP and auction events in classic SAP Ariba Sourcing), you can choose map the term to an existing bidding rule (select **Bidding rule** from the **Create as** dropdown)
  Select an existing term from the **Map to an existing bidding rule** dropdown.

> ⓘ Note
>
> Bidding rules must be configured in the auction event to perform this operation. For more information, Bidding Rules [page 89]

After you modify the mappings or mark an item as reviewed, the warning icon for the column disappears.

> ⓘ Note
>
> Columns that have system-generated mappings with high confidence scores may not show the warning icon even if you have not reviewed or modified the mappings.

9. Click **Apply**.

Reviewing Mappings for Questions

When you do smart import from an unstructured Excel file, SAP Ariba Strategic Sourcing Suite provides mappings suggestions for the columns, including questions, in the Excel file. Use this procedure to review those mappings.

Context

From the **Preview questions** tab, you can review the system-generated mappings for the questions and make the necessary modifications.

Procedure

From the **Preview questions** tab, review the imported questions and the system-generated mappings for the questions.

a. If you want to change the mapping for question title, click the three-vertical-dots icon in the first column header and from the **Edit question title** popup, select the column that you want to assign as the question title.
b. From the **Initial value** column, click the three-vertical-dots icon to review the mapping and attributes such as **Required type**, **Answer type**, and **Visibility type**.

   The attributes you set at this step apply globally to all questions in the table. However, you can override the settings at the line-item level by setting the values at the line-item level. You can click the three-vertical-dots icon at the item level to specify attributes at the item level.

   > Note
   >
   > You cannot change the column mapping at the line-item level.

Importing Content from an Unstructured Excel File While Creating RFI or Auction Events

Use this procedure to import content from an unstructured Excel file while creating RFI or auction events. Importing event content is an alternative method of adding data to RFI or Auction events when you've the required information readily available in an Excel file.

Prerequisites

- You must also be a member of one of the following groups:
  You must be the event owner or have project owner capabilities for the event.
- Ensure that the the automated scheduled task **AutoMLModelGenerator** has run at least once for the site. If not, run the scheduled task **SourcingUnstructuredMLModelGenerator** for generating the model.
- You must be the event owner or have project owner capabilities for the event.
- Ensure that the Excel file from which you want to import event content is available at a location that you've access to.
- Ensure that the content that you want to import is on the first sheet of the Excel file.
- Ensure that the first row of the Excel sheet contains the header information. Note that the first row of the table is always interpreted as the header row.

Context

If you're creating an RFI or an Auction event in classic sourcing and you've the event content already available in an Excel file, you can skip the manual task of adding the content to the event by simply uploading the Excel file and importing the data to the event. To import different content types, you can use a multi-sheet Excel file.

The import data may or may not be in a structured format. In case you've unstructured data in the Excel file, SAP Ariba Sourcing interprets the data from the file and maps that to various fields based on the global settings or template settings. You can review and revise the mappings before the data import is finalized.

Procedure

1. On the dashboard, click **Create** > **Sourcing Project**.
2. Enter a name for the project.
3. From the **Event type** dropdown list, select **RFP** or **Auction**.
4. From the **Test Project** option buttons, select **No**.
5. From the **Smart import from Excel** options, select **Yes**.
6. Click **Create**.

   The **Import content to your event from a spreadsheet** page appears.
7. Click **Drop a spreadsheet, or browse** to browse and locate the .xls or .xlsx file that contains the import data.

   You can also drag and drop the Excel file in this placeholder.

   > → Tip
   >
   > Although SAP Ariba Sourcing fully supports unstructured data imports, you can choose to download a sample spreadsheet and prepare the import data in a structured format. This can help reduce issues that may occur while parsing unstructured data. To download a sample spreadsheet, click **Example spreadsheets**.
8. Review the sheet mappings in the **Manage worksheets** popup.
   a. If any mapping is incorrect, modify the mapping by selecting the appropriate content type from the drop-down list.
   b. If you want to exclude a worksheet from the import, click the *delete* icon to move the sheet to the **Worksheets that will not be imported** list.
   c. If you want to include a worksheet from the **Worksheets that will not be imported** list to the list of **Worksheets that will be imported**, click the **Include this worksheet** link next to the name of the worksheet that you want to add to the import.
   d. Review the mapping of the worksheet you added to the **Worksheets that will be imported** list and make any modifications as necessary.
   e. Click **Confirm**.

   > ⓘ Note
   >
   > - You can have more than one worksheet mapping to the same content type. If you import content from more than one worksheet to a content type, contents from different worksheets are shown as sections.

> - Only for competitive events (like auctions and RFPs), the content type for line item worksheets is shown as **Items/terms/bidding rules**
> - If you want to delete a worksheet, click the corresponding button.

9. From the **Preview items** tab, review the item-level mappings. For more information about item-level mapping, see Reviewing Item-Level Mappings [page 106]
10. From the **Preview questions** tab, review the imported questions and the system-generated mappings for the questions.
    a. If you want to change the mapping for question title, click the "three-vertical-dots" icon in the first column header and from the **Edit question title** popup, select the column that you want to assign as the question title.
    b. From the **Initial value** column, click the "three-vertical-dots" icon to review the mapping and attributes such as **Required type**, **Answer type**, and **Visibility type**.

    The attributes you set at this step apply globally to all questions in the table. However, you can override the settings at the line-item level by setting the values at the line-item level. You can click the three-vertical-dots icon at the item level to specify attributes at the item level.

    > Note
    >
    > You cannot change the column mapping at the line-item level.
11. From the **Preview requirements** tab, review the requirements.
    a. Click the "three-vertical-dots" icon to view the title mapping for the requirement. You can modify the mapping and select the column that you want to appear as the requirement title.
12. After you complete the review of the imported content and revise mappings that need to be corrected, click **Import to Draft Event** and then, click **Next** to complete the event creation steps.

    > Note
    >
    > The number of columns, items, questions, and requirements supported for import depends on site-level configurations. If you receive an error message that states any of these values exceeds the maximum limit, remove the entries to ensure that the worksheet contents are within the supported limits. To increase the maximum supported limit, contact your site administrator (Customer Administrator).

Smart Importing Line Items Linked to Material Master

If the SAP Ariba Strategic Sourcing Suite site is integrated with an SAP ERP system, you can smart import items and the ERP system ID and fetch the corresponding item details from the material master data in the ERP system. This procedure demonstrates how to smart import line items linked to material master.

Prerequisites

- You must be the event owner or have project owner capabilities for the event.
- The Smart import from Excel for guided sourcing events site parameter must be set to **Yes** (the default value).

- Ensure that the the automated scheduled task **AutoMLModelGenerator** has run at least once for the site. If not, run the following scheduled tasks for generating the appropriate models:
  - **SourcingUnstructuredMLModelGenerator**
  - **ContentRecommendationMLModelGenerator**
  - **SupplierRecommendationMLModelGenerator**

  > ⓘ Note
  >
  > In classic sourcing, only the **SourcingUnstructuredMLModelGenerator** scheduled task is available. In guided sourcing, all three scheduled tasks are available.
- Ensure that the Excel file from which you want to import line items for the RFP event is available at a location that you have access to. are completed.
- Ensure that the first row of each Excel sheet contains the header information. Note that the first row of the table is always interpreted as the header row.
- Ensure that the currency format in the Excel file is the same as that is specified in the event.

Context

To be able to fetch item details from the material master, you must have specified the ERP system ID in the **Choose external system for integration** section of the **Create Event** page while creating the event.

> ⓘ Note
>
> The ERP system ID in the Excel sheet that you use to import the items must match the ERP system ID you selected in the **Choose external system for integration** section of the **Create Event** page.

Procedure

1. Create an Excel file (`.xls` or `.xlsx`) that contains the following details:
   - Material ID
   - External system ID

   You can also add the following details:
   - Name
   - Cost
   - Quantity
   - Plant
   - Lead time

   > ⓘ Note
   >
   > You can download a sample file from the **Upload Excel file for smart import** page by clicking the **Click to download example spreadsheets** link and selecting **Material master sample**.

2. Update the Excel sheet with the necessary details such as material ID and ERP system ID and save.

   > ⓘ Note
   >
   > Ensure that the ERP system ID that you enter in the Excel sheet is the same as the ERP system ID you selected in the **Choose external system for integration** section of the **Create Event** page.

3. Go to the **Upload Excel file for smart import** page.

   You can access the **Upload Excel file for smart import** page from the create a guided sourcing event workflow or the create an RFP event workflow [page 103].

   Alternatively, you can open an event that is in draft state and click the *More actions* (three vertical dots) icon and click **Import content from Excel**. From the **Choose import method and upload file** popup, click **My own format (use smart import** option.

4. From the **Drop a spreadsheet, or browse** link on the **Upload Excel file for smart import** page, click browse and locate the `.xls` or `.xlsx` file that contains the unstructured data. Alternatively, you can drag and drop the `.xls` or `.xlsx` file to the area marked as **Drop a spreadsheet, or browse**.

   The **Manage worksheets** popup displays the system-generated mappings for the sheets in the uploaded workbook. Sheets are mapped to the most-relevant content type based on the content on the sheets. If no matching content type is identified, the sheet is listed under the **Sheets that will not be imported**.

5. Review the sheet mappings in the **Manage worksheets** popup and ensure that the content is mapped to **Items/terms**. For information about reviewing the sheet mappings, see Managing Sheet Mappings [page 105].

   > ⓘ Note
   >
   > You can have more than one sheet mapping to the same content type. If you import content from more than one sheet to a content type, content from different sheets are shown as sections.

   The *Preview* page appears.

6. From the **Preview items** tab, review the item-level mappings and make the necessary modifications. For information about reviewing item-level mappings, see Reviewing Item-Level Mappings [page 106].

7. From the **Preview questions** tab, review the mappings for the questions.

   For more information about reviewing questions, see Reviewing Mappings for Questions [page 107].

8. From the **Preview requirements** tab, review the requirements.

   a. Click the three-vertical-dots icon to view the title mapping for the requirement. You can modify the mapping and select the column that you want to appear as the requirement title.

9. After you complete the review, click **Import to draft event**.

   > ⓘ Note
   >
   > The number of columns, items, questions, and requirements supported for import depends on site-level configurations. If you receive an error message that states any of these values exceeds the maximum limit, remove the entries to ensure that the spreadsheet contents are within the supported limits. To increase the maximum supported limit, contact your site administrator (Customer Administrator).

   SAP Ariba creates a draft RFP with the items and contents shown in the preview table.

10. Invite suppliers to the event and add or edit contents as needed.

Importing Content from an Unstructured Excel File to an RFP Event

Use this procedure to import content from an unstructured Excel file to an RFP event.

Prerequisites

- You must be the event owner or have project owner capabilities for the event.
- Ensure that the the automated scheduled task **AutoMLModelGenerator** has run at least once for the site. If not, run the scheduled task **SourcingUnstructuredMLModelGenerator** for generating the model.
- Ensure that the Excel file from which you want to import line items for the RFP event is available at a location that you have access to.
- Ensure that the content that you want to import is on the first sheet of the Excel workbook.
- Ensure that the first row of the Excel sheet contains the header information. Note that the first row of the table is always interpreted as the header row.
- Ensure that the currency format in the Excel file is the same as that is specified in the event.
- Note that you can add content only to events in draft state.

Procedure

1. Select the draft sourcing project to which you want to add content and click **Edit**.

   If you import an unstructured Excel file to an RFP event that is in draft state, the newly-imported data overwrites any line-item content present in the event.
2. Navigate to the **Content** page of the event.
3. Click **Smart import from Excel** at the bottom of the page.

   The **Upload Excel document to smart import** page appears.
4. Click **Drag file here or browse to upload** to browse and locate the `.xls` or `.xlsx` file that contains the unstructured data. Alternatively, you can drag and drop the `.xls` or `.xlsx` file to the area marked as **Drag file here or browse to upload**.

   > ⓘ Note
   >
   > To view sample Excel files, click the **Click to download example spreadsheets** link and download a sample spreadsheet. You can download a single-sheet, multi-sheet, or material-master spreadsheet.
   >
   > Note that these sample spreadsheets are for reference purpose only and are not meant for enforcing any particular structure or format.
5. Click **Import**.

   The **Manage worksheets** popup displays the system-generated mappings for the sheets in the uploaded workbook. Sheets are mapped to the most-relevant content type based on the content on the sheets. If no matching content type is identified, the sheet is listed under the **Sheets that will not be imported**.

6. Review the sheet mappings in the **Manage worksheets** popup. For information about reviewing the sheet mappings, see Managing Sheet Mappings [page 105].

> ⓘ Note
>
> You can have more than one sheet mapping to the same content type. If you import content from more than one sheet to a content type, content from different sheets are shown as sections.

   The *Preview* page appears.
7. From the **Preview items** tab, review the item-level mappings and make the necessary modifications. For information about reviewing item-level mappings, see Reviewing Item-Level Mappings [page 106].
8. From the **Preview questions** tab, review the mappings for the questions.

   For more information about reviewing questions, see Reviewing Mappings for Questions [page 107].
9. From the **Preview requirements** tab, review the requirements.
   a. Click the three-vertical-dots icon to view the title mapping for the requirement. You can modify the mapping and select the column that you want to appear as the requirement title.
10. After you complete the review of the imported content and revise any mappings that need to be corrected, click **Next** and complete the steps to save the event.

Importing Content from an Unstructured Excel File to an RFI or an Auction Event

Use this procedure to import content from an unstructured Excel file to an RFI or an auction event. Importing event content is an alternative method of adding data to RFI or Auction events when you've the required information readily available in an Excel file.

Prerequisites

- You must also be a member of one of the following groups:
  You must be the event owner or have project owner capabilities for the event.
- Ensure that the the automated scheduled task **AutoMLModelGenerator** has run at least once for the site. If not, run the scheduled task **SourcingUnstructuredMLModelGenerator** for generating the model.
- You must be the event owner or have project owner capabilities for the event.
- Ensure that the Excel file from which you want to import event content is available at a location that you've access to.
- Ensure that the content that you want to import is on the first sheet of the Excel file.
- Ensure that the first row of the Excel file contains the header information. Note that the first row of the table is always interpreted as the header row.

Context

If you've created an RFI or an Auction event in classic sourcing but not yet added content to it, you can skip the manual task of adding the content to the event by simply uploading the Excel file containing event data. To import different content types, you can use a multi-sheet Excel file.

The import data may or may not be in a structured format. In case you've unstructured data in the Excel file, SAP Ariba Sourcing interprets the data from the file and maps that to various fields based on the global settings or template settings. You can review and revise the mappings before the data import is finalized.

Procedure

1. Open the draft sourcing project to which you want to add content in edit mode.
2. Navigate to the **Content** page of the event.
3. Click **Smart import from Excel**.

   The **Import content to your event from a spreadsheet** page appears.
4. Click **Drop a spreadsheet, or browse** to select the .xls or .xlsx file containing the import data from your computer.

   You can also drag and drop the Excel file in this placeholder.

   > → Tip
   >
   > Although SAP Ariba Sourcing fully supports unstructured data imports, you can choose to download a sample spreadsheet and prepare the import data in a structured format. This can help reduce issues that may occur while parsing unstructured data. To download a sample spreadsheet, click **Example spreadsheets**.
5. On the **Manage worksheets** popup, review the mapping of the worksheet you added in the **Worksheets that will be imported** list and make any modifications as necessary. .
   a. If any mapping is incorrect, modify the mapping by selecting the appropriate content type from the **Content type** drop-down list.
   b. If you want to exclude a worksheet from the import, click the 🗑 button. This action will move the worksheet to the **Worksheets that will not be imported** list.
   c. If you want to include a worksheet from the **Worksheets that will not be imported** list to the list of **Worksheets that will be imported**, click the **Include this worksheet** link next to the name of the worksheet.
   d. Click **Confirm**.

   > ⓘ Note
   >
   > - You can have more than one worksheet mapping to the same content type. If you import content from more than one worksheet to a content type, contents from different worksheets are shown as sections.
   > - Only for competitive events (like auctions and RFPs), the content type for line item worksheets is shown as **Items/terms/bidding rules**.
6. If your worksheet contains line-item details, review the item-level mappings in the **Preview items** section. For more information about item-level mapping, see Reviewing Item-Level Mappings [page 106]

7. If your worksheet contains questions, review the questions and the system-generated mappings for the questions in the **Preview questions** section.
    a. If you want to change the mapping for question title, click the "three-vertical-dots" button (More actions) in the first column header and select **Edit question title**. From the **Edit question title** popup, select the column that you want to link to the question name from the **Column linked to Question name** drop-down list.
    b. To edit a question, click the "three-vertical-dots" button (More actions) and select **Edit question** from the **Initial value** column. Review the mapping and attributes such as **Answer type**, **Is a response required?**, and **Visible to participant**.

        The attributes you set at this step apply globally to all questions in the table. However, you can override the settings at the line-item level by setting the values at the line-item level. You can click the three-vertical-dots icon at the item level to specify attributes at the item level.

        > ⓘ Note
        >
        > You cannot change the column mapping at the line-item level.
8. If your worksheet contains requirements, review the requirements in the **Preview requirements** section.
    a. Click the "three-vertical-dots" button (More actions) and select **Edit requirement** to view the column linked to the requirement name. You can modify the mapping and select the column that you want to appear as the requirement title.
9. After you complete the review of the imported content and revise mappings that need to be corrected, click **Import to Draft Event**.

    > ⓘ Note
    >
    > The number of columns, items, questions, and requirements supported for import depends on site-level configurations. If you receive an error message that states any of these values exceeds the maximum limit, remove the entries to ensure that the worksheet contents are within the supported limits. To increase the maximum supported limit, contact your site administrator (Customer Administrator).

Event Service Items and Service Hierarchies

Event contents can include items for services, such as consulting or maintenance services.

Prerequisites

To use service items and service hierarchies:

- To enable service items and service item hierarchies, you must enable all of the following toggles:
    - UP-4293
    - UP-5387
    - UP-7455
    - UP-18784

    You must also set the parameter **Application.ACM.ComplexServiceHierarchy.Enabled** to **Yes**.

Have your designated support contact file a service request (SR) to enable these items.
- To allow alternative bids for service items, the parameter **Roll up term values in alternative bids** (`Application.AQS.RFX.RollupAlternativeAttributeValue`) must be set to **Yes**.
  Your administrator can set this parameter in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.
- The event template must have a **Service Line** defined and a line item defined with the terms required for service specifications as described in About the Definitions Tab (Item Definitions in Templates) [page 490].

About Service Items and Service Hierarchies

If you use the SAP RFQ and Award Integration with SAP Ariba and service hierarchies features, your organization can receive RFQs from SAP with service items and send award data back to SAP with service items. To be compatible with SAP service item hierarchies (SAP Item Category D item hierarchies), you organize service items in hierarchies that have 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).

Each service item hierarchy can include spend limits (Overall Limit) towards the total cost of unplanned service line items in the award. The Overall Limit is the maximum value towards the total of all unplanned services.

If your site uses the SAP RFQ and Award Integration with SAP Ariba and service hierarchies features, you can use service hierarchies to:

- Import a sourcing request from an SAP RFQ with service items. (The service items are sent with the cXML `itemClassification` elements set to `service`.)
- Create a sourcing event with service hierearchies by using one of the following methods:
  - Use a sourcing request that has SAP service items to create a sourcing event. The sourcing event will automatically contain the service items from the sourcing request.
    You can also use a sourcing request that contains SAP service items to create a full sourcing project and then create a sourcing event in the full project. Use the **Add** > **Content from Sourcing Request** menu option to add the service items from the sourcing request to the event contents.
  - Add service items to sourcing events directly from the SAP Ariba interface (the service items do not originate from an SAP RFQ).
- Export award information to SAP that contains service line items.
  When SAP ERP receives the award containing service items from SAP Ariba Sourcing it creates a purchase order or outline agreement (contract). SAP Ariba Sourcing receives a confirmation message, records the results in the event audit log (under the event's **Log** tab), and sends an email notification to team members.

You can also use service hierarchies in SAP Ariba Contracts contract line items documents (CLIDs). If you create a contract workspace with a CLID from an event award, the CLID will inherit service hierarchies (and line items) from the award. You can also manually add service hierarchies to CLIDs. In addition, you can send CLID data to the SAP ERP.

Restrictions

- Supplier bundle and volume tier alternative bids are not supported for service items.
- If you create a sourcing event from an SAP RFQ (from a sourcing request that was created from an SAP RFQ) and you will send award data back to SAP, **do not add service lines to the event**. If you add service lines to an event that contains service items from an SAP RFQ and send award data back to SAP, SAP ignores any added service lines (service lines that did not originate from the SAP RFQ) and does not create service items for the added service lines.
- If a CLID is created from a sourcing award, the **Extended Price** for service items is not included in the CLID.

Related Information

Envelope Bidding with Alternative Bids for Lots and Service Items [page 226]

Creating Service Items in Events

Use this procedure to create service items in events. If your site uses the service hierarchies feature, you can add service items to events that are compatible with SAP service item (SAP Item Category D items) hierarchies. If your site also uses the SAP RFQ and Award Integration with SAP Ariba feature and SAP sends an RFQ with service items, SAP Ariba Sourcing creates a sourcing request that contains service hierarchies for the service items in the RFQ.

Prerequisites

To use service items and service hierarchies:

- To enable service items and service item hierarchies, you must enable all of the following toggles:
  - **UP-4293**
  - **UP-5387**
  - **UP-7455**
  - **UP-18784**

  You must also set the parameter **Application.ACM.ComplexServiceHierarchy.Enabled** to **Yes**.
  Have your designated support contact file a service request (SR) to enable these items.
- To allow alternative bids for service items, the parameter **Roll up term values in alternative bids** (`Application.AQS.RFX.RollupAlternativeAttributeValue`) must be set to **Yes**.

  Your administrator can set this parameter in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.

- The event template must have a **Service Line** defined and a line item defined with the terms required for service specifications as described in About the Definitions Tab (Item Definitions in Templates) [page 490].

Context

A service hierarchy has 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).

> **Restriction**
>
> - Supplier bundle and volume tier alternative bids are not supported for service items.
> - If you create a sourcing event from an SAP RFQ (from a sourcing request that was created from an SAP RFQ) and you will send award data back to SAP, **do not add service lines to the event**. If you add service lines to an event that contains service items from an SAP RFQ and send award data back to SAP, SAP ignores any added service lines (service lines that did not originate from the SAP RFQ) and does not create service items for the added service lines.
> - If a CLID is created from a sourcing award, the **Extended Price** for service items is not included in the CLID.

Procedure

1. Open an event for editing and navigate to the **Contents**.
2. If the event contents were **not** created from an SAP RFQ (there are no service items with values in the **RFQ ID** field), you must create at least one 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. Select a **Commodity**. This must be a commodity that is mapped to an SAP service item in the commodity mapping table for your site. If you do not know which commodity codes are mapped to SAP service items, contact your site administrator.
   e. Enter values for additional terms if needed. If you do not specify a value for **Quantity**, the value 1 is assumed.
   f. **Optional:** Select access control values.
   g. Click **Done**.

Event Terms

Topics about terms in events.

Event Terms

Terms have specialized functions including:

- Collecting participants' pricing information: Price or Extended Price, Index Percentage or Amount
- Collecting other information from participants: Shipping terms, or any other term that you define
- Containing owner defined information about the line item: Quantity, Index Name
- Displaying calculated information about line item: Total and Unit Cost, Savings or Earnings, Discount Amount and Percentage
- Containing cost information. The cost terms used to calculate total cost are specialized item terms.
- Adding a matrix dimension to a term.

The following terms are preloaded:

Term	Description
Price	The amount that the participant receives for selling an individual item. This term is used in the TotalCost formula in the Total Cost term in the Total Cost Auction template. It is also a term that appears in reports, even if you change its name.
Quantity	The number of items (defined by the line item) that you want to buy. Like Price, this term is also used in the Total Cost Auction template and reports.
Extended Price	This term uses a formula that is the Price term times the Quantity term, or the total price of the line item. This term appears in reports.
Shipping Terms	A line of text describing the shipping terms. For example: COD.
Savings	In a reverse auction, Savings is the historical value of a term minus the current value; the total amount that you have saved.
Earnings	In a forward auction, Earnings is the actual value minus the historical value of a term.
Unit Cost	The amount that the buyer pays to purchase a single item. Unit Cost = Total Cost / Quantity.
Total Cost	In a transformation auction, participants' prices are transformed into your total cost using a transformation equation that you create with one or more cost terms. If you use the Total Cost Auction template you can create new terms and specify whether they are adders, subtracters, multipliers, or % discount terms. When you do, they are automatically applied to this Total Cost term.
Index Name	The index used in an index auction.
Index Percentage	In an index auction, the competitive term representing the participant's bid, in percentage above or below an index.
Index Amount	In an index auction, the competitive term representing the participant's bid, in nominal amount above or below an index.
Document URL	This term is available in RFI and RFP events for SAP Ariba Strategic Sourcing Suite users. The purpose of this term is to provide a link (**URL**) that participants can click to obtain documents from your site about the item with a **Description**. If the **Enable document URL terms** event rule is not enabled for the event, you manually specify a URL and description for this term. If the **Enable document URL terms** event rule is enabled for the event and your site has implemented the `DocumentURLOutBound` and `DocumentStatusChangeNotification` web services, the web services will retrieve the URLs when you publish an event or the event status changes (the event is closed, reopened, extended, suspended, or canceled). The URL will be retrieved even if you set the rule to **Yes** with **Delegated**. You must set the rule to **No** if you want the URL not to be overwritten. You can verify the URLs returned by the web services before publishing the event by clicking **Retrieve document URLs** on the event contents page, then checking the banner (top) area of the contents page to view the status of the **Retrieve document URLs** operation. In addition, you can check the status (**Info** field) displayed for each document URL in the event **Content** or **Summary** area. **Note** Any values manually entered for **Document URL** terms are overwritten if web services are used to retrieve values.

You can edit terms in the previous table by clicking on the term in the Item Terms area and choosing **Edit**. You can edit existing terms or create new terms in much the same way that you edit or create questions. If you change the name of a term, it is automatically changed in any formulas where it is used.

> ⓘ Note
>
> Terms might have the same name. You can distinguish them by their **Unique Name**.

The most common use of custom item terms is as cost terms. Cost terms are used in bid transformation.

Related Information

About Cost Terms [page 186]
Is This a Matrix Term? [page 123]
About Forward Auctions [page 18]
About Event Index Auctions [page 212]
Common Event Content Fields [page 156]
About Bid Transformation Events [page 184]
Mass Editing Event Terms [page 130]

Types of Item Term Fields

The following sections discuss Item Term fields that are unique to terms.

- Event Requirements [page 131]
- Apply to Cost For [page 123]
- Rollup in Section Summary [page 123]
- Is This a Matrix Term? [page 123]
- Display Term in Column or Row [page 124]
- Has Historic Value [page 124]
- Has Reserve Value [page 125]
- Is Term Editable in Alternatives? [page 125]
- Will Participants Compete on This Term? [page 125]

Related Information

Common Event Content Fields [page 156]

Include in Cost

This option appears only if the template you are using allows formulas. The options are:

- **No** – non-numeric answer types such as text cannot be used in formulas.
- **Custom** – enables you to map the non-numerical answer types (text, date, and yes/no) to numerical values so you can use them in formulas.
- **Adder**, **Subtracter**, **Multiplier**, or **% Discount** – These options determine how the term is used in the various functions.

Related Information

About Event Formulas [page 142]
Aggregate Costs (AGGREGATECOSTS) [page 145]
Total Cost (TOTALCOST) [page 148]

Apply to Cost For

This appears only if **Include in cost** is not set to **No**. The options **Per Unit** and **All Units** affect where the term is used in calculating total or aggregate costs.

Rollup in Section Summary

This option is available only for terms with numerical answer types. Select **Yes** to sum up the values in multiple rows and display them at the section level.

> Note
>
> Column type Matrix Terms do not rollup in the Section Summary.

If you use the **Rollup in section summary** option and you also use access control settings to limit access to items with this term (or sections that contain such items), you may want to set the Hide Rollup Values from Users Who Can't Access All Child Values [page 575] site configuration parameter. This parameter prevents users who cannot view all child values from using the rollup terms to calculate child values.

Is This a Matrix Term?

Matrix pricing functionality is available in SAP Ariba Sourcing Professional. Matrix pricing dimensions enable you to create a table of prices for an item or lot. For example, if a certain commodity had separate pricing for different regions, rather than manually create a separate item for each region, you can create one item for the commodity and then add a Region term as a matrix dimension. When you edit the matrix you can quickly add new regions.

> ⓘ Note
>
> Matrix pricing is not supported for large-capacity events.

Display Term in Column or Row

You can display terms in a column or a row in the bid console table. Displaying a term in a column requires more space, so it is best to avoid that unless you use them in the majority of the line items in your event. To reorder columns, reorder the Item Terms while editing the line item.

Related Information

Bidding Rules [page 89]

Has Historic Value

Use historic values to track how the information that you collect compares to past values. SAP Ariba Sourcing uses pricing information collected through historic values to calculate savings. Changes to the term you make editable are shared for all the items containing the same term.

You can choose three options when setting this field. Each has a different impact on how savings are calculated. This is not a cost term.

- **No** (the default): There is no historical value for this term, so it is not used in savings calculations and does not affect the historical total cost formula.
- **Yes**: You must supply a historic value for savings calculations. If left blank (zero), any values that suppliers (participants) enter result in negative savings.
- **Yes and required** or **Yes, required from event owner**: You cannot publish the event unless a historic value is provided, so there is no danger of flawed savings calculations.

Cost terms are in effect only in the templates RFP with Price Breakdown and Reverse Auction with Bid Transformation.

Related Information

About Bid Transformation Events [page 184]
About RFPs with Price Breakdown [page 222]
About Cost Terms [page 186]

Has Reserve Value

In an auction, the reserve value is the price at which it begins to make sense for you to award business to a new participant. This is not a cost term.

Is Term Editable in Alternatives?

The lot type **Bid discounted value at Item level, compete at Lot level (collect item pricing during bidding)** is known as a "bundle" lot. When the buyer or the participant drags an item into the bundle, the system references the original item (it retains the original item number), but allows it to have a different price when sold as part of the bundle. You must to be able to edit the term that needs to be different inside the bundle.

- **Not Editable** – Neither the project owner nor the participant can change this term when it is in a bundle. The value that this price has is the same as the term outside the bundle.
- **Editable by owner only** – The owner can adjust this term when it is in a bundle, but the participant must then accept it as is.
- **Editable by owner and participant** – The project owner can set this term, but the participant can change it when it is in a bundle, for example, to lower a price for an item when the item is in a bundle.

> ⓘ Note
>
> An item has many terms. You decide which term the participant can change. Generally it is the price. Since most terms are not editable, the default is **Not Editable**, so do not forget to make at least one term **Editable by owner and participant**. Changes to the term you make editable are shared for all the items containing the same term.
>
> When `Application.AQS.RFX.EnableIsTermEditableInAlternativesToEditableByOwnerAndParticipant` parameter is enabled, the default value for **Is term editable in alternatives** is set to **Editable by Owner and Participant** and suppliers can edit the questions added at the event level in the alternative responses. Contact SAP Ariba Support to enable this parameter.

In some cases you may wish to make none of the terms editable except a discount term. However you do it, make sure you remember to set at least one term to be editable, or the bundle will not provide any advantage at all.

Will Participants Compete on This Term?

If you choose one of the **Yes** options, this term appears on the list of terms from which you can choose the competitive term. It does not actually make it the competitive term. When you are done defining this term and return to the line item, the "Compete on term" option pull-down menu includes this term. If you do not want this term to appear on that list, choose **No**.

You must choose one of the **Yes** options if you want to require participants to improve their bids on this term, even when it is a non-competitive term (not selected to be the competitive term).

This option also enables you to create a term that bids in the opposite direction of the auction as a whole. For example, in a reverse auction, where bidding gets lower, you can use this to create a discount that lowers total cost by getting higher.

Choose **Yes, Downward bidding** if improving the bid means lowering it or **Yes, Upward bidding** if improving the bid means raising it.

> ⓘ Note
>
> When you create a forward auction template, the default for the rule **Will participants compete on this term?** is **Yes, Downward bidding**. You need to change it to **Yes, Upward bidding**.

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.

> ⓘ 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.

Related Information

Automatic Validation of Term Values

Adding Event Terms to Lots and Items

Use this procedure to add event terms to lots and items.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Lots are usually composed of one or more line items. It is possible to have a lot with no line items and line items that are not in lots.

Procedure

1. On the **Add or Edit Items** page, or the **Add or Edit Lot** page, click the check box next to the terms you want to add.
2. Click **OK**, or choose the **New Term** tab.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Types of Item Term Fields [page 122]
Creating Event Content Items [page 79]

Creating Event Matrix Pricing

Use this procedure to create event matrix pricing.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Matrix pricing functionality is available in SAP Ariba Sourcing Professional. Matrix pricing dimensions enable you to create a table of prices for an item or lot. For example, if a certain commodity had separate pricing for different regions, rather than manually create a separate item for each region, you can create one item for the commodity and then add a Region term as a matrix dimension.

Procedure

1. Add a line item to your project.
2. Choose **Add** > **Term** .
3. On the **Add Term** page, click the **New Term** tab.
4. Enter the term name (for example, Region).

5. The **Is this a matrix term?** selection must be set to **Yes**. **Yes** is only available when these conditions are met on the **Add Term** page:
   - Answer Type is a simple numeric, text, or date value.
   - Acceptable Values is set to **Any Value**.
   - Response Required is set to **Yes, Owner Required**.
   - Visible to Participant is set to **Yes**.
   - **Use participant-specific initial values?** is set to **No**.
6. Set the **Display term in a column or row** to row.

   The term will already display a column for price, initial value, historic value, and reserve value. If you make region a column, the number of columns becomes the number of regions times four. You can always go back and change this setting later. Matrix terms displayed as columns have a limit of 15 factors. If this limit is exceeded, the content is restructured to display the term in rows to maintain space and performance.
7. Click **OK** to return to the item.

   The new Region term appears with the value APAC, as entered in the example. This is the prototype factor for the Region dimension. After providing the required fields for bid decrement and initial, historic, and reserve values, you must return to the Content page to edit the line item. Matrix is a new option that appears when a term is defined as a dimension.
8. Click **Done** to return to the **Content** page.
9. Select the line item to which you just added a dimension term and select **Edit** > **Matrix.**
10. On the **Matrix Edit** page, define the different values for the dimension term you created. In cases like this you are defining the region rows for this line, so click **Region**.

    When you select a matrix term, the factor you created as a prototype (the APAC region, in this example) appears in the Matrix Factors list.

    > Note
    >
    > Matrix Factors are counted as line items and apply to content limits in events.
11. Click **Add** in the Matrix Factors list to create additional regions. Create one for Europe (EUR) and USA.

    A table is displayed under **Items** that contains columns for all matrix factors for a selected matrix term. If you add matrix factors for a matrix term, they are added to the Items table for that matrix term. (Or you can delete matrix factors and they are deleted from the Items table.) Each matrix factor in the table has a checkbox that can be selected for an individual item. When you first open this page you see checkboxes only for the initial matrix factor values. Columns and checkboxes are added and removed as you add and remove matrix factors for the selected matrix term. This allows you to control which matrix factors are applied to each item, thereby allowing you to control the line items that are created based on the matrix term.

    When you select the **Refresh** button, your list of line items is updated on the **View Matrix** page and on the sourcing event overview page.
12. Click **Apply**.

    Now your pricing terms will appear in a table for which there is a row of pricing terms (Initial, Historic and Reserve) for each region. You can also set it up so that the regions are displayed as columns, but each region shows up as a three columns for initial, historic, and reserve prices. If you have many factors, like different regions, the table can be very wide.
13. Continue adding term dimensions to cover all aspects of the dimension you want to include (for example, various regions).

Results

Now that you have created this matrix term, it will appear by default in any new line items you create.

Related Information

About Event Content [page 76]
Event Content Limits [page 26]
Best Practices for Creating Event Content [page 79]
Event Terms [page 120]
Creating Event Content Items [page 79]

Mass Editing Event Terms

Use this procedure to mass edit event terms. If you have terms that are common to multiple line items in a sourcing event 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.

Procedure

1. Navigate to the **Content** tab of the Event page.
2. Select the line items that you want to edit.
3. Select **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.

   If all suppliers have responded to the event, an **Attributes** section is displayed containing a single attribute, **Read Only for Participants**. You can edit this to apply to all selected line items.
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 sourcing event.

Event Attachments and Requirements

Topics about attachments and requirements in events.

About Event Attachments and Requirements [page 131]

Adding Event Attachments [page 132]

Converting Event Attachments and Requirements into Prerequisites [page 133]

About Event Attachments and Requirements

Event Attachments

Attachments are files that provide additional information to participants. For example, if you are running an event for automobile parts, you might attach CAD files detailing the design of the parts. Participants click a link to download and view the files on their own computer, which is recorded in the Audit log. Communicate to your participants the file format of your attachments and the applications they need to view them.

You can attach up to 10 files that reside on your computer simultaneously, or you can add files from the sourcing library. If many events at your organization use the same file attachments, it makes sense for you to upload these files to the sourcing library for you or others to use in their events.

Attachments can also have attached reference documents. That is, you can only specify one file to be an "Attachment," but the **Attachment** object can have multiple reference documents attached to it. When you export the event to a spreadsheet, attached reference documents are exported in an accompanying ZIP file.

You can convert an attachment into a Yes/No question [page 81]. On the **Content** tab, select the attachment, click **Edit** > **Convert to Yes/No Question**, and set the initial value in the pull-down menu that appears. You can then edit the question further to modify other attributes of the question, for example, to make it a prerequisite question with a different answer type.

> Note
>
> - If you want to collect information from participants in the form of a file attachment they upload, choose **Add Question** and set the answer type to **File Attachment**.
> - By default, the maximum size for each file attachment or certificate that a participant can upload is 100 MB.

Related Information

Uploading Files to the Sourcing Library [page 182]

Event Requirements

Requirements are statements you can add to the event to communicate information about your expectations. Participants do not need to respond to these statements. For example, at the beginning of the section containing your Commercial Terms, you might add a requirement stating, "You must read and comply with these commercial terms," which SAP Ariba Sourcing presents in read-only text.

Requirements can also have attached reference documents. When you export the event to a spreadsheet, attached reference documents are exported in an accompanying ZIP file.

You can convert a requirement into a Yes/No question. On the **Content** tab, select the requirement, click **Edit** > **Convert to Yes/No Question**, and set the initial value in the pull-down menu that appears. You can then edit the question further to modify other attributes of the question, for example, to make it a prerequisite question with a different answer type.

Adding Event Attachments

Use this procedure to add event attachments.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Attach files to provide additional information to participants. For example, if you are running an event for automobile parts, you might attach CAD files detailing the design of the parts. Participants click a link to download and view the files on their own computer, which is recorded in the Audit log. Communicate to your participants the file format of your attachments and the applications they need to view them.

Procedure

1. On the **Content** tab of the **Event** page, choose **Add** > **Attachments from Desktop** to add files that reside on your computer, or **Add** > **Attachments from Library** to add files from the sourcing library.
2. Add the first file and enter a description. If you want to use the attachment name in the description, leave the description field blank, and reply yes to the system prompt to confirm use of the attachment name in the description field.
3. Click **Show Details** to set the participant visibility and team access control attributes.
4. If you want to add additional files, click **Add More**. Enter the file details and set the participant visibility and team access control attributes. You can add up to 10 files.
5. When you have specified all files that you want to attach, click **Done**.

   If you want to remove files that you added perhaps by mistake before uploading them, select the files and click **Delete**.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Event Attachments [page 131]
Creating Event Content Items [page 79]
Visible to Participant [page 159]
Team Access Control [page 161]

Converting Event Attachments and Requirements into Prerequisites

Use this procedure to convert event attachments and requirements into prerequisites.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

You can convert existing attachments and requirements into prerequisite questions, if required.

Procedure

1. On the **Content** tab of the **Event** page, select the attachment or requirement, and choose **Edit** > **Convert to Yes/No Question**.
2. Set the initial value in the pull-down menu that appears. By default, the initial value is **Unspecified**.
3. Choose **Edit** > **Content** and modify the question's attributes.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Creating Event Content Items [page 79]
Creating Event Questions [page 81]

Event Sections

Sections in events are similar to folders or directories and you can use them to organize your content within events. You can create any kind of content inside of a section. You can nest sections by creating sections within sections.

If you are using grading and scoring, the structure of nested sections affects how scores are summed up. Refer to Advanced Scoring Concepts for more information.

Building Envelopes

Sections at the root level can be made part of envelopes, if the event is not a large-capacity event and the **Number of Envelopes** rule specifies one or more envelopes.

You can place as many sections as you want within an envelope. Any other type of content you want to put in an envelope has to be in a section. When using envelopes to comply with regulations, make sure the content of each envelope is correct, and consider whether it is necessary to explain to event participants that you are using them. Events with envelopes do not look any different to event participants.

You can tell that a section is part of an envelope by looking for the envelope icon. Move the pointer over the icon to view the envelope number.

You can assign the ability to open envelopes to project groups. This allows you to assign a specific subset of team members with the ability to open an envelope. You can create project teams for each envelope and include or exclude team members as needed. You can also choose to authorize multiple project teams to open a single envelope.

Project group members will receive notifications when an envelope is ready to be opened. Event owners and active observers will receive notifications when envelopes have been opened. Notifications are sent during envelope bidding when the following events occur:

- An envelope is ready to be opened. Project team members authorized to open an envelope receive an email when an envelope is ready to be opened.
- An envelope has been opened. Event owners and active observers receive an email when an envelope has been opened.

Ability to Recover Rejected Envelopes

You can recover and open previously rejected envelopes during an envelope bidding event. The ability to control whether rejected envelopes can be recovered and opened at a later time is controlled by the **Allow rejected envelope bids to be opened** event rule. A modified envelope bidding agreement alerts suppliers that rejected envelopes may be recovered during the event. Suppliers must accept the agreement before they can participate in the event. The event audit log is updated when suppliers accept the agreement and when rejected envelopes are opened.

> Note
>
> Only users in the **Recover Rejected Envelopes** group can recover and open rejected envelopes.

Ability to recover rejected envelopes restrictions

This feature has the following restrictions:

- Envelope bidding rules appear for RFI and standard-capacity RFP events. It is not available for large-capacity events.
- Rejected envelopes can only be recovered and opened when the event is in a **Pending Selection** state.
- After a rejected envelope has been recovered and opened, it can no longer be rejected.
- Only users in the **Recover Rejected Envelopes** group can recover and open rejected envelopes.

Related Information

Opening Envelopes [page 476]
Authorizing Project Teams to Open Envelopes [page 136]
Authorizing Project Teams to Open Specific Envelopes [page 136]
Opening Rejected Envelopes [page 477]
Envelope Bidding with Alternative Bids for Lots and Service Items [page 226]

Authorizing Project Teams to Open Envelopes

Use this procedure to authorize project teams to open envelopes.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Procedure

1. On the **Rules** page, click the down-arrow at the right side of the entry field for the envelope to which you want to authorize a project team.
2. Click **Search for more** to view recently-selected users (for any group) or search for additional team members.
3. Check the box to the left of the project team you want to add and click **Done** in the lower right corner.

Authorizing Project Teams to Open Specific Envelopes

Use this procedure to authorize project teams to open specific envelopes.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. Choose and open the RFI or RFP template you want to edit.
3. Click the name of the template you want to edit in the **Documents** section and choose **Action** > **Edit**.
4. Optionally, you can create a new RFI or RFP template:
    a. From the **Actions** menu, choose **Create** > **Template**.
    b. From the **Select Project Type** for **Template** page, click **Sourcing Project** and click **OK**.
    c. Provide a name and a description for the template project.

    > Note
    >
    > By default, new RFP templates are set to competitive and the rule **Must participants improve their bids** to **Yes**. If you want the ability to add envelopes to your RFP template, you must set the rule **Must participants improve their bids** to **No**.

5. In the **Envelope Rules** section, configure the following rules:
    - **Number of Envelopes** - Select the maximum number of envelopes to use in this event. The default is **No Envelope**.
    - **Authorize Teams to Open Envelopes** - Select a project team for each envelope. Members of the project team you select here will be the only team members authorized to open the corresponding envelope. If you do not want to authorize a specific project team to open an envelope, leave the **Team** field blank.
    - **Keep the Rejected Envelope Bids** - Select **Yes** to retain the opened portions of rejected envelope bids in the system. If you select **No**, the rejected bids and all their previous versions are deleted from the system.
    - **Discard Bids for Event Updating** - When you update an event, you can choose to keep or discard envelope bids. Select **Always Discard** to discard the bids regardless of what type of edit you make to the event. Select **Keep the Bids** to retain the bids as long as the edits do not impact the integrity of the envelope bids.
    - **Send notification to envelope openers** - Select **Yes** to have project team members notified when they can open their assigned envelope.
6. Choose to delegate, hide, or make the envelope bidding rules read-only.
7. Publish the template.

Envelope Bidding with Team Access Control

Envelopes control who can see participant responses in SAP Ariba Sourcing events and when the responses can be seen.

Prerequisites

To use this feature, you must either

- set the rule **Must participants improve their bids?** to **No** (by default, this rule is set to **Yes**), or

- enable envelopes in competitive events [page 139].

You can create envelopes in RFI and RFP events so that participant responses are not visible until the envelope is opened. An event typically contains multiple envelopes, and you configure project teams (groups) who are authorized to open envelope bids for each envelope.

Envelopes are opened serially. Authorized group members select which participants will advance to the next envelope; only responses from the selected participants are visible in the next envelope.

The group authorized to open the first envelope in an event (envelope 1) sees responses from all participants, then selects the participants who will advance to envelope 2. The group authorized for envelope 2 sees only responses from participants who were selected to advance from envelope 1.

As an example, you can create an event with envelope 1 that collects technical information and have the responses evaluated by a technical team, then use envelope 2 to collect commercial information to be evaluated by a business team. If you're also using grading and scoring, the technical team can also assign grades that affect terms or values in envelope 2 that are evaluated by the business team.

The event rule **Will teams control envelope access?** controls how envelopes are opened and how participants are selected. If **Will teams control envelope access?** is set to **Yes**, authorized group members first open envelopes, then select the participants who will advance to the next envelope opening. If **Will teams control envelope access?** is set to **No**, authorized group members first select participants to advance to the next envelope opening, then open only the envelopes of the selected participants.

The default value for **Will teams control envelope access?** is **No** (authorized group members select participants to advance, then open only the envelopes of the selected participants). However, in most cases, you should set **Will teams control envelope access?** to **Yes**, which is the setting in the suggested workflow below. This workflow allows the authorized group to see responses **before** selecting participants to advance to the next envelope opening.

Workflow

- The event owner or template author sets the event envelope rule **Will teams control envelope access?** to **Yes**.

  > ⓘ Note
  >
  > For this workflow, be sure to set this rule to **Yes**. The default for this rule is **No**. If you leave the default, the authorized group won't be able to see responses before selecting participants to advance to the next envelope opening.

  The event owner or template author configures additional envelope rules, including:
  - **Number of Envelopes**
    Each envelope is linked to one or more sections, and the envelope contains responses for all items in the sections.
  - The group or groups authorized to open each envelope.
    For information about all event envelope rules, see Event Rules Reference Guide.
- The event owner or template author ensures that the rule **Must participants improve their bids?** is set to **No**, or that envelopes are enabled for competitive events.
- The event owner or template author creates sections and specifies the envelope for each section. The event owner or template author adds questions, lots, or items to the sections.
- The event owner publishes the event.

- Participants submit responses and bids. Bidding closes for the event and the event state is **Pending Selection**.
- A user in the group authorized for envelope 1 opens envelope 1. The user:
  - Opens the event and selects **Actions** > **Open Envelope** in the upper right corner of the event page.
  - On the **Open Envelope Confirmation** page, the user selects **Open Envelope**.
- Users in the group authorized for envelope 1 view participant responses to items in envelope 1. This is the first envelope, so responses from all participants are visible.
- A user in the group authorized for envelope 1 selects participants to advance to the next envelope (envelope 2). The user:
  - Selects **Actions** > **Choose suppliers for next envelope** in the upper right corner of the event page.
  - In the **Choose suppliers to advance to the next envelope** page, the user selects the suppliers (participants) to advance and clicks **Unseal Next Envelope**.
    This enables users in the group authorized for envelope 2 to open the next envelope. In envelope 2, only responses from the selected participants will be visible.
- A user in the group authorized for envelope 2 opens envelope 2. Users in the authorized group can view only the responses from the participants selected to advance from envelope 1. If there are additional envelopes, a user in the group authorized for envelope 2 selects participants who will advance to the next envelope.

Related Information

Enable envelope for competitive event [page 573]
Event Envelope Rules
Must participants improve their bids
Enabling Envelopes in Competitive Events [page 139]
Show lead bid to all participants

Enabling Envelopes in Competitive Events

You can enable envelope bidding in competitive events by using a self-service parameter.

To use envelope bidding in competitive events, set the self-service parameter **Enable envelope for competitive event** [page 573] to **Yes**. The default is **No**.

> **Note**
>
> "Competitive events" in the context of envelope bidding means events in which either of the event rules **Must participants improve their bids** or **Show lead bid to all participants** has a setting other than **No**, or events in which both of these rules have a setting other than **No**.

When you use envelope bidding in competitive events,

- the **Bid Console** tab doesn't appear until the buyer has opened all envelopes in an event.
- after the buyer opens a supplier's envelope, the buyer sees both the supplier's response and bid rank.
- if a buyer opens rejected envelopes in an event, SAP Ariba Sourcing recalculates the bid ranks.

Related Information

Enable envelope for competitive event [page 573]
Event Envelope Rules
Must participants improve their bids
Show lead bid to all participants

Event Table Sections

Table sections allow you to define questions in table format, with defined columns and cell field types. For example, you might ask participants to provide specific shipping information based on the locations of your plants. Rather than adding questions requesting information for each plant location separately, you can set up a table with a number of questions, and columns for each plant you require information about.

Table sections can contain questions, attachments, and requirements, which constitute the rows in the table. You have to add at least one question, attachment or requirement to a table section before you can add columns to it.

When participants respond to table sections, they must click the table section icon to display the table information in a dialog box and enter their answers. After they click **OK**, their responses are saved, but they will not be validated until the entire response is submitted.

> ⓘ Note
>
> - A question added as part of a table section cannot be a prerequisite question.
> - The table section view in table format is not available on the Scoring page, or to graders in the grading interface. On the Scoring and Grading Interface pages, each cell in a table row is displayed as a separate row.

Adding Event Table Sections

Use this procedure to add event table sections.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Table sections allow you to define questions in table format, with defined columns and cell field types. For example, you might ask participants to provide specific shipping information based on the locations of your plants. Rather than adding questions requesting information for each plant location separately, you can set up a table with a number of questions, and columns for each plant you require information about.

Procedure

1. In the **Content** page, choose **Add** > **Table Section.**
2. Enter a **Name** (required), and any optional field values.
3. On the **Add** pull-down menu, choose **Question, Requirement**, or **Attachment** to create the rows in your table.

   On the **Add Question**, **Add Requirement**, or **Add Attachment** page, by default the **Location** attribute is set to **Add Inside**. If you choose the location as **Add After**, then the question, requirement or attachment is added after the table section, and not as a row into the table.
4. Enter any other optional values.

   For requirements, if you attach a reference document, then the reference document applies to all columns. You can only upload specific requirement reference documents for each column in the requirement row if you are importing your content from Microsoft Excel.
5. If you add an attachment, add the file attachment.
6. Click **Done**.
7. On the **Content** page, click the table icon next to the table section you just added, or click the active link and choose **Action** > **Edit**.
8. On the **Edit Table Section** page, click **Add/Edit Columns.**

   > **Note**
   >
   > You must have added at least one question, requirement or attachment before you can add columns.

9. Enter the first table column name. Click **Add** to add additional values.
10. Click **Apply** to add the columns to your table.

    If you created an attachment row, all cells will have the same attachment after you added the columns to your table section.
11. Click **Update** file to upload a different file for each cell.
12. If you set **Use participant-specific initial values** to **Yes** for a table section question, enter the initial values in each of the cells. Questions that were specified as requiring participant-specific initial values are marked with a pi symbol on the Edit Table Section page.

    If you want to delete a row in a table section, select any one of the selection boxes in the columns, and then click **Delete**.

    This also applies to questions with participant-specific values; click a check box in a participant row in any column to delete the entire row.

    > Note
    >
    > You can edit the table section, and you can edit the columns, but you cannot edit any questions, attachments or requirements (rows) in the table section. If you need to change a row, you must delete the row and then add it again.

Event Formulas

Formulas enable you to create terms in an auction or forward auction event and then use the term values provided by event participants or the project owner in calculations. For example, you can create terms for price, quantity, shipping cost, discount, and tax, and then create a formula that uses these terms to calculate the total cost.

About Event Formulas

Formulas allow you to insert terms you have defined for any type of event and display them in calculations. For example, you can create terms for price, quantity, shipping cost, discount, and tax, and then create a formula that uses these terms to calculate the total cost.

A simple formula might look something like this:

```
'Price'*'Quantity'
```

Formulas support all the common mathematical operators and parentheses for grouping:

```
('Price'+'InstallationFee')*'Quantity'
```

You can add as many terms as you need and use terms that are derived from other formulas. SAP Ariba also provides a set of functions you can include in formulas.

Using SPQ Questions in Template Formulas

Template creators can build complex formulas that include SPQ questions in event templates. This allows project owners to utilize complex formulas without having to build and validate formulas when they create events.You can create formulas that calculate values based on the answers to SPQ questions with numerical values for answers. You can use any question type in your template formulas, however answer types such as Yes/No, Text, or Date must be mapped to numerical values in order to use them in formulas. Numerical answer types, such as Whole Number or Money, can be used in formulas without modification.

> ⓘ Note
>
> To use responses to a specific question in a formula, you must make sure that Use in formula is set to Yes for that question and map any non-numerical answer types to numerical values.

You must be a member of the Project Owner group on the Supplier Knowledge Area Team tab in order to edit and publish the supplier profile questionnaire.

Planning for Event Formulas

You can add formulas at various places in the event content.You can build a formula from terms or questions, if they are numerical and included in total cost. You can also use other formulas. Which formulas, questions, and terms are available depend on where they are located relative to the formula you are creating.

You can place a formula:

- At the top level of your event.

  > ⓘ Note
  >
  > Event content is arranged in a hierarchy of numbered elements in which some elements, such as lots and sections, can have child elements such as line items and terms.

- In a section that is at the top level (but not in a section within a lot).
- In a line item.
- If you try to add a formula to any other content type, it is added after that content, at the same level.

When you add a formula, the formula editor presents a list of other content elements that are available for use within the formula. The content that is available depends on where the formula is and where and how the other content was defined.

ⓘ Note

- For a question to be available for use in a formula, “Answer type” has to be a numerical value. To map text (or yes/no, or a date) to a numerical value, you have to specify that the term be included in the cost as Custom.
- For a term to be available in a formula, it has to resolve to a numerical value.

If you are planning an event that uses formulas, organize the content so that each formula has access to the content elements that it uses.

Formulas at the top level or section can use:

- Other top level formulas
- Formulas in sections (but not in line items or cost terms within the section)
- Questions (regardless of where they are located)

Formulas in a lot or line item can use:

- Top Level Formulas
- Sibling formulas (formulas within the same content element)
- Formulas at the section level in other sections
- Terms defined at the lot level in this lot
- For formulas in a line item in a lot, terms in the same item and terms in the parent lot
- Questions (regardless of where they are located)

Related Information

Event Requirements [page 131]
Creating Event Questions [page 81]

About Formulas in Smart Imports

You can import simple formulas when using the smart import feature.

If you use the smart import feature to upload an Excel file that contains simple formulas for any of the line-item terms, these terms are identified as a formula term in the line-item preview. Simple formulas perform one of the following calculation operations: addition (+), subtraction (-), multiplication (*), or division (/). When you review the term, you can retain the formula, create a new term based on the data, or map the data to an existing term. If a term contains a complex formula, that formula is marked as unsupported formula.

If the unstructured Excel file that you uploaded for smart import contains a formula, when you review the term from the **Preview items** table, select **Formula** from the options for **Create as a new term** in the **Edit term** dialog box. This option is selected by default for simple formulas and the formula is displayed in the **Edit term** dialog box.

If you want to import the data as a term and not as a formula, you can select **Yes** to create a new term or **No** to map it to an existing term.

If the formula is a complex formula, it is by default marked as a term. If you select the **Formula** option for an unsupported formula, the formula appears in strike-through text with the label **Unsupported formula**. However, if you apply the **Formula** option to an unsupported formula, a term is created as an empty formula and the data is imported.

Complex Event Formulas

You can create more complicated formulas from the Price, Quantity, Extended Price, Savings, and Installation Time (in hours) terms.

For example, you can create a total cost that is the price times the quantity, plus the installation time times the hourly labor rate times the quantity.

```
‘Price’*’Quantity’
+’Installation_Time_(in_hours)’*’Event.What_is_your_hourly_labor_rate?’*’Quantity’
```

Using Formulas for the Ranking Term

The formulas you define can also be used to rank the bidders in the event. This allows you to create a point score formula that includes information from SPQ questions, participant bids, and about how a participant’s bid compares to other participant bids. You can then use this formula as the ranking term and rank the event participants based on this formula.

Using Functions

The formula engine supports a number of other functions, which may be useful in certain circumstances. For all of these functions you may use all upper case, all lower case, or initial cap, such as TOTALCOST, totalcost, or TotalCost. Initial cap means each whole word within the function name gets a capital letter.

Absolute Value (ABS)

The function syntax is `ABS(X)`. for example, `ABS(-6)` returns 6.

Aggregate Costs (AGGREGATECOSTS)

The function syntax is `AGGREGATECOSTS()`, It takes no argument. The value returned is the aggregate of all the terms defined as adders, subtracters, multipliers, and % discount, but without the price or quantity, as follows:

```
Aggregate Cost = UA * UM + AA * AM
```

Where:

- `UA` are per-unit adders, minus the subtractors
- `UM` are per-unit multipliers including % Discount
  To get a 10% discount you multiply by 0.9 or 1-%D
- `AM` are all-unit multipliers including % Discount
- `AA` are all unit adders, minus the subtractors

Current Maximum Value (CurrentMaxValue)

> Note
>
> This function is supported only in guided sourcing events.
>
> This function is evaluated in real time as responses are submitted. Using this function in events that contain more than 20 lines, 5 formulas, and 20 suppliers can cause significant delays in performance for actions that evaluate responses, including: bid acceptance for participants, visibility of new responses, and bid ranking.

The function syntax is:

`CurrentMaxValue("term")`

Where *`term`* can be any term with a numeric value, such as `'Price'`.

This function can be used to define a term with a relative value based on the values of another term. It returns the current maximum value of the other term, based on responses from all participants.

You can use the function formulas `CurrentMinValue` and `CurrentMaxValue` to calculate relative term values based on the minimum or maximum values submitted for a term. For example, consider the supplier responses as given in the following table and the formula `TotalAmount = Price * Quantity - CurrentMaxValue("'Discount'")`.

When calculating the `TotalAmount` for Supplier A and B, the value of `CurrentMaxValue("'Discount'")` is `100` (highest of the two `Discount` values). Supplier C then submits a response with a `Discount` that is `120`, a higher discount, so the value of `CurrentMaxValue("'Discount'")` changes to `120`. The `TotalAmount` of Supplier A and B are also recalculated accordingly.

The functions are calculated and recalculated in real time.

	Price	Quantity	Discount	TotalAmount (Before Supplier C)	TotalAmount (After Supplier C)
SupplierA	100	100	100	100 * 100 - 100 = 9900	100 * 100 - 120 = 9880
SupplierB	200	100	90	200 * 100 - 100 = 19900	200 * 100 - 120 = 19880
SupplierC	150	100	120		150 * 100-120=14880

You can create formulas using the `CurrentMinValue`, and `CurrentMaxValue` functions with grading and scoring to assign relative scores. For example:

- Minimum score = `100*(CurrentMinValue("'Price'")/'Price')`
- Maximum score = `100*('Warranty_Period'/CurrentMaxValue("Warranty_Period"))`

Current Minimum Value (CurrentMinValue)

> Note
>
> This function is supported only in guided sourcing events.
>
> This function is evaluated in real time as responses are submitted. Using this function in events that contain more than 20 lines, 5 formulas, and 20 suppliers can cause significant delays in performance for actions that evaluate responses, including: bid acceptance for participants, visibility of new responses, and bid ranking.

The function syntax is:

`CurrentMinValue("`*`term`*`")`

Where *`term`* can be any term with a numeric value, such as `'Price'`.

This function can be used to define a term with a relative value based on the values of another term. It returns the current minimum value of the other term, based on responses from all participants.

You can use the function formulas `CurrentMinValue`, and `CurrentMaxValue` to calculate relative term values based on the minimum and maximum values submitted for a term as shown in Current Maximum Value (CurrentMaxValue) [page 146].

Earnings over Historic Value (EARNINGS)

The function syntax is `EARNINGS(X)`. Where X can be any term with a historic value, such as Extended Price. In a forward auction the value returned is the current value minus the historic value. For a reverse auction, use `SAVINGS`.

If-Then Construct (IF)

The function syntax is `IF(B, X, Y)`. If B is greater than zero, it returns the value of X. If B is less than or equal to zero), it returns the value of Y and does not evaluate X. You can use other terms, formulas, or expressions, for B, X, or Y. If B is undefined (no value is assigned) it is treated as zero and returns Y.

Maximum Value (MAX)

The function syntax is `MAX(X,Y)`. This function returns the greater of X and Y. For example, `MAX(2, 3)` is 3. You can use other terms, formulas, or expressions, for X and Y.

Minimum Value (MIN)

The function syntax is `MIN(X,Y)`. This function returns the lesser of X and Y. For example, `MIN(2, 3)` is 2. You can use other terms, formulas, or expressions, for X and Y.

Price from Breakdown (PRICEFROMBREAKDOWN)

The function syntax is `PRICEFROMBREAKDOWN('Price').` The value returned is the total of all the per-unit adders defined for this line item.

Rollup (EXTENDEDPRICE)

The function syntax is `ROLLUP('Extended_Price').` The value for Extended price at lot level is the roll up or sum of the Extended price of all the line items. For example, if LINEITEM1 and LINEITEM2 are within LOT1, the LOT1 Extended price is the sum of or rollup of the extended price of LINEITEM1 and LINEITEM2.

Savings from Historic Value (SAVINGS)

The function syntax is `SAVINGS(X)`. Where X can be any term with a historic value, such as Extended Price.
In a reverse auction the value returned is the historic value minus the current value. For a forward auction, use `EARNINGS`.

Total Cost (TOTALCOST)

The syntax for this function is `TOTALCOST(P, Q)`. This function uses the price and quantity terms (or hourly rate and hours). the value returned automatically applies all the terms defined as adders, subtracters, multipliers, and % discount to the Price times Quantity calculation as follows:

```
TotalCost=(P*UM + UA) *  Q * AM + AA
```

Where:

- P is Price
- UM are per-unit multipliers including % Discount
- UA are per-unit adders, minus the subtracters
  To get a 10% discount you multiply by 0.9 or 1-%D.
- Q is Quantity
- AM are all-unit multipliers including % Discount
- AA are all unit adders, minus the subtracters

Actual Cost of Each Unit (UNITCOST)

The syntax for this function is `UNITCOST(P, Q)`. This function takes the price and quantity terms (or hourly rate and hours). The value returned automatically applies all the terms defined as adders, subtracters, multipliers, and % discount to the Price and divides by the quantity to arrive at an actual unit cost as follows:

```
UnitCost=((P*UM + UA) * AM + AA)/Q
```

Where:

- P is Price
- UM are per-unit multipliers including % Discount
- UA are per-unit adders, minus the subtracters
- To get a 10% discount you multiply by 0.9 or 1-%D
- Q is Quantity
- AM are all-unit multipliers including % Discount
- AA are all unit adders, minus the subtracters

Using Mathematical Operators

You can enter all supported operators from the keyboard. Only some of them are assigned to buttons in the user interface. The operators are:

- + Plus; 3+2=5
- - Minus; 3-2=1
- * Multiplication; 3*2=6)
- / Division; 3/2=1.5
- ^ Exponent; 3^2 is 3 squared or 9
- % Modulo division

The logical operators below can be used as the B parameter in the `IF` function. These logical operators resolve to true or false, where true is 1and false is 0.

- ! Logical NOT; !1 is False (zero) and !0 is True (one)
- > Greater than; 3>4 is False (zero)
- < Less than; 3<4 is True (one)
- <= Less than or equals; 3<=4 is True (one)
- >= Greater than or equals; 3>=4 is False (zero)

The following cannot be used as expressions in other functions:

- = Equals; 3=4 is False (zero)
- & Logical AND; P & Q is True if both P and Q are true or false. It is false if P and Q are different.
- | Logical OR; IF((‘A’ | ‘B’), X, Y) If either A or B is true, X is returned. If neither is true, Y is returned.
- <> Not EQUALS; IF((‘A’ <> ‘B’), X, Y) If A is greater than B, X is returned.

Function Parameters

Any of the parameters for these functions can be terms, expressions, other functions, or values.

For example, an expression as a parameter in the IF function is valid: `IF('Price'>4), 100, 10)`

Some operators cannot be used as parameters, as noted above. For example, you cannot use `IF('term1'&'term2', 33, 66)`, but you *can* use `IF('term1'>'term2', 33, 66)`.

Additional spaces are ignored: `IF ( 'Price' > 4), 100, 10)`

More complex functions are possible:

```
IF (MIN('Price','Price2')<7, 33, 'Price'*2)
```

Some functions resolve to a number. If you use one as a parameter in another function that is expecting a true or false, values that are less than or equal to zero are false and values that are greater than zero are true.

If a numerical term has no value assigned to it, it is treated as zero or "false." (This is not the case with undefined text fields). You can use this feature in an IF statement that checks to see which of two alternate fields a supplier provided, and then use that field in further processing, such as calculating extended price.

A function parameter cannot be a string or a term that is not available for use in the formula.

Checking for Errors

If the formula is complex, you can validate it as you build it, at any stage that you think conforms to the rules of algebra, by clicking the **Validate** button. If there is an error, SAP Ariba Sourcing cannot tell you exactly what the problem is, so it is recommended that you check for:

- Misspelled terms or function names
- Terms not in single quotes
- Functions are not be in quotes (You can use term names that are the same as function names because term names are in quotes and function names are not, but this is potentially confusing and it is recommended that you avoid it).
- Mismatched parentheses
- Missing commas

The following anomalies are tolerated:

- Using both the plus and minus operators, such as 'Price1' + - 'Price2'.
- Dividing by zero, such as 'Price'*'Quantity'/0.

If you want to test a proposed formula to make sure it is valid, try typing in the formula using actual numbers and then clicking the **Validate** button.

You can also go back to the **Contents** page and choose **Actions** > **View as Participant**. Here you can plug in values and check to make sure the results of the formula are as you expect.

Event Cost Components

Cost components are content elements that you can set up to automatically contribute to total cost. The Total Cost Auction template already has these components set up, but you can set them up manually if you are using a template that allows you to create formulas.

Cost components are terms that contribute to the total cost of a lot or line item. they can include not only the price of the item, but also shipping costs, import duties, cost of switching suppliers, storage cost, retooling costs, taxes, discounts, or anything else that you can apply to each unit or all units collectively.

You can control whether the cost component feature is turned on when you create the template by configuring the rule **Can project owner create formulas**.

If the cost component feature is enabled, then when you create a term you see the option "include in cost:" and among the choices are **Adder**, **Subtracter**, **Multiplier** and **% Discount**.

If Formulas are also enabled, then you must hook up the cost component feature manually by creating a Total Cost term and using the **TotalCost** function in its formula.

Creating Simple Event Formulas

Use this procedure to create simple event formulas.

Prerequisites

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)

If you are in the **Template Creator** group, you can create formulas in event templates and control whether or the extent to which project owners can create or edit templates formulas for events.

Enabling formulas in a template is controlled by the rule **Can project owner create formulas**.

For a question or term to be available for use in a formula, you have to set **Include in cost** to **Custom**. You can set a term or a question to be a list of text items or dates, but if you set **Include in cost** to **Custom**, it allows you to map each list item to a value so you can use the term or question in formulas.

Context

Create formulas from the **Content** section of an event project or template. To create formulas as part of a sourcing event project, the event template has to allow the project owner to create templates. If this is not allowed in a project template, the **Formula** option does not appear. This topic assumes you are in the Content section of a sourcing event project.

When you configure event formulas, you can configure the following options:

- **Result Type**: – The choices are **Decimal Number**, **Money**, or **Money Difference**. **Money** displays the result with the appropriate currency symbol. **Money Difference** is valid only with formulas that contain the **Savings** or **Earnings** function; it displays the difference between the input value and the output value for the formula as both a money value and a percentage.
- **Number of decimal places**: – The default is two.
- **Response Required?** – Set this to **Not Required**. A supplier (participant) cannot supply a value for a formula.
- The following options appear only for formulas added to lots or line items.
- **Visible to Participant:** – This option only appears if participants are not required to respond. If you choose **Yes**, they can see the computed value of this formula. If the template from which this project is created has set the **Show formulas to all participants** rule to **Yes**, they will be able to see the value and the formula from which it is computed.
- **Will participants compete on this term?** – **Yes** means that the participants rank is based on the value computed by this formula. If you choose **No**, this formula can still be used in another formula in which they compete, so it can still be a competing term, indirectly.
- **Rollup results in section summary:** – **Yes** means that this formula name and value appear in the section summary. If you create a formula with the same name in other line items in this section, the sum of their values appears in the section summary. This is a key concept. Since you cannot create a formula that can see all the terms in other line items, this is how you can total them up.
- **Terms with undefined values default to 0** – **Yes** means that any date or numeric (quantity, decimal, percentage, and whole number) terms in the formula that do not have a value specified as evaluated as 0.
- **Display formula in column or row:** – If you choose **Column**, the name of the term appears on the top row with the name of the line item and the value is below it. If you choose **Row**, the name is to the left, below the name of the line item with the value to the right of it.
- **Has Historic Value:** – If you choose **Yes** this value can be used to compute savings over past purchases. To use the historic value for the formula, you must also specify a historic value when you define the term.
- **Has Reserve Value:** – If you choose **Yes**, this specifies the maximum you are willing to pay. To use the reserve value for the formula, you must also specify a reserve value when you define the term.

Procedure

1. Do one of the following:
   - To add a formula at the top level, make sure no boxes are checked and choose **Add** > **Formula**.
   - To add a formula to an item of content, click the item name and choose **Action** > **Edit**. Then choose **Add** > **Formula**.
2. Enter a name for the formula.

3. In the lower section of the **Formula** pane, set up the formula properties.

Related Information

About Event Formulas [page 142]
Planning for Event Formulas [page 143]
Inserting Simple Event Formulas [page 153]

Inserting Simple Event Formulas

Use this procedure to insert simple event formulas.

Prerequisites

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)

If you are in the **Template Creator** group, you can create formulas in event templates and control whether or the extent to which project owners can create or edit templates formulas for events.

Enabling formulas in a template is controlled by the rule **Can project owner create formulas**.

For a question or term to be available for use in a formula, you have to set **Include in cost** to **Custom**. You can set a term or a question to be a list of text items or dates, but if you set **Include in cost** to **Custom**, it allows you to map each list item to a value so you can use the term or question in formulas.

Context

Create formulas from the **Content** section of an event project or template. To create formulas as part of a sourcing event project, the event template has to allow the project owner to create templates. If this is not allowed in a project template, the Formula option does not appear. This topic assumes you are in the **Content** section of an sourcing event project. You build the formula in the field below the name field.

Procedure

1. In the **Content** section, find the term you want to use in the formula and click **Insert**. This places the term in single quotes in the **Formula** field.

   The **Content** section lists all the terms in the line item in which you are creating this formula, which in this example, is 3.2 Printer. It also lists **Questions** from other sections, such as 2.1 and 2.2. These terms and questions are set to "Include in Cost." The lists scrolls, so there are other elements that you can use.
2. Click the button for the operator you want to place after this term. For example, if you want the formula to multiply **Price** times **Quantity**, click the asterisk (multiplication) button.
3. In the **Content** section, find the next term you want to use in the formula and click the **Insert** button. For example, if the formula is to multiply **Price** times **Quantity**, the formula field looks like this:

   'Price'*'Quantity'

   You can type directly into the **Formula** field without selecting operators or terms from below. It does not check to make sure that the terms already exist, so you can create the terms later, if you want. Be sure to use single quotes for all terms, use underscores instead of spaces, and avoid typographical errors.
4. The formula is now complete. Click **Validate** to validate the formula and return to the page from which you started.

Related Information

About Event Formulas [page 142]
Planning for Event Formulas [page 143]
Creating Simple Event Formulas [page 151]

Using Lead Bid Values in Event Formulas

This procedure describes how to use lead bid values in event formulas.

Prerequisites

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)

If you are in the **Template Creator** group, you can create formulas in event templates and control whether or the extent to which project owners can create or edit templates formulas for events.

Enabling formulas in a template is controlled by the rule **Can project owner create formulas**.

For a question or term to be available for use in a formula, you have to set **Include in cost** to **Custom**. You can set a term or a question to be a list of text items or dates, but if you set **Include in cost** to **Custom**, it allows you to map each list item to a value so you can use the term or question in formulas.

> ⚠ Restriction
>
> Due to the potential impact on system performance, formulas that use the Best Price (Best Extended Price) term do not calculate or display values in the user interface until the event enters a **Pending Selection** state.

Context

You can pull the best price submitted by participants into a formula term. This allows you to include participant bid values and the best bid from the leading bidder in formulas.

You can use the following two terms to include the best participant bid in formulas:

- Best Extended Price
- Best Price

Best Extended Price is typically used for lots.

Procedure

1. Click the name of the line item or lot and choose **Action** > **Edit**.
2. On the **Edit Item** or **Edit Lot** page, in the **Lot** or **Item** terms section, choose **Add** > **Term**.
3. On the **Add Terms** page, choose **Best Price** or **Best Extended Price**.
4. Click **OK**.

Related Information

About Event Formulas [page 142]
Planning for Event Formulas [page 143]
Creating Simple Event Formulas [page 151]
Inserting Simple Event Formulas [page 153]

Common Event Content Fields

Many of these fields are common to more than one type of content. If an option does not appear, it may be set to **Hidden** in the template or it may require another option to be set differently. If it appears but cannot be changed, the template is set to **View only**.

Name

For questions, enter the question that clearly indicates what answer is required. For example, write “How many employees do you have?” rather than “Number of employees.” If the question is to be used in a formula, keep it short to keep the formula readable.

For lots and line items, use unique names that are descriptive of the type or content.

For terms, use a unique name that is clear but, if used in formulas, is not so long that it makes it hard to decipher the formula.

Restricted Question

This option controls whether unauthorized users can edit restricted questions and view their responses.

When set to **Yes**, only authorized group members can edit restricted questions and view their responses. This rule appears only when the **Prevent editing questions and viewing responses** rule is set to **Yes**. By default, this rule is set to **No**, and the question is not restricted to any user group.

When you set the rule to **Yes**, then in the **Questions, requirements, and attachments** panel in guided sourcing events in draft state, the following user interface changes occur for unauthorized users:

- The **Edit question** option is unavailable.
- The **Move**, **Copy**, **Delete**, and **Edit questions** buttons are disabled.

Answer Type

Specify the answer type. The default is a single line of text. However, with other answer types, such as date, you can:

- Accept only an answer of that type.
- Restrict the answer to a range.
- Assign scores that affect the grade the participant receives during the evaluation stage. For more information, see Grading and Scoring.

These features allow you to ensure that suppliers provide appropriate answers and do not accidentally leave information out or answer in a confusing or irregular format.

The following table describes the answer types available:

Answer Type	Description	Size / Range
Text (single line limited)	The answer field accepts a single line of text (numerical and alphabetic characters); no carriage returns.	Size: 256 characters
Text (single line)	The answer field accepts a single line of text (numerical and alphabetic characters); no carriage returns. If “Include in cost” is Custom, there is no multiple lines option, but you can add additional lines with this option.	Size: unlimited. Large size text inputs affects performance.
Text (multiple lines)	The answer field is initially six lines and can be expanded indefinitely with a vertical scroll bar. This option does not appear if “Include in cost” is Custom.	Size: unlimited
Long Text (multiple lines limited)	The answer field accepts multiple lines of text, up to 100,000 characters. Only the first 50 characters of the supplier’s answer appear in the user interface. When you click the answer link, the supplier’s full answer displays in a new window. This answer type cannot be used with automatic scoring and pre-grading and it cannot be added into cost. However, you can manually grade on this answer type. Although full supplier answers do not appear in the user interface, you can compare the full answers side by side in the Questions and Terms report. By default, this answer type is not available. You must contact SAP Ariba Customer Support to enable the **Application.AQS.RFX.AllowLongText** parameter.	Size: 100,000 characters
Whole Number	A whole number, for example, 1, 20, 852.	Range: -2^31 - (2^31)-1 (-2,147,483,648 - 2,147,483,647)
Decimal Number	A decimal number, for example, 19.5, or 1.23. The default value is two decimal places.	Range: ten
Date	A formatted date, for example: Fri., 12 Aug., 2005	January 1, 1900–January 1, 9999
Money	A decimal number plus currency symbol. The default value is two decimal places.	Range: +/- 10^18
Yes/No	The input field is a pull-down menu with **Yes** or **No** for an answer (boolean).	Yes or No

Answer Type	Description	Size / Range
Attachment	This option is available if **Include in cost** is set to **No**. You use this to collect information from participants as file attachments [page 131] uploaded from their computer. You can provide a default attachment, that participants can change. To provide an informational read-only attachment that participants can download but for which you do not want them to upload anything, use Add Attachment.	Max size: 100 MB
Percentage	For example: 33%, 88%, 500%. The default value is two decimal places.	Range: +/- 10^17
Quantity	The **Quantity** field is a number. to the right of this field is the unit of measurement. The default is **each**. you can click the unit of measurement and select from the list.	Range: +/- 2,147,483,648

Number of Decimal Places

This field is available for Decimal Number, Money, and Percentage answers.

Acceptable Values

This option enables you to restrict the answers to a list of choices, which allow you to score the answers more easily. The options are Any Value, List of Choices, and Limited Range.

Choose **Any Value** to provide a text entry field that accepts any entry.

Choose **List of Choices** to create multiple choices. When you select this option, two additional sub–options appear:

- **Allow participants to specify other value?**
  If you enable this option, an Other field will appear below the question, allowing participants to enter their own value. The Other field is not displayed while creating content. It is displayed to participants during the event. You can view it by selecting **View as Supplier** from the **Action** menu on the Content page.

  > Note
  >
  > The **Other** field cannot be pre-graded and must manually be graded.

- **Allow participants to select multiple values?**
  This option displays check boxes instead of radio buttons, so participants can select multiple answers. If you enable pre-grading, and participants select multiple values, the assigned pre-grade is the sum of the pre-grades for each answer.
  If you allow multiple values, they are mapped to numbers, and this question is included in cost, then all the selected values are used. If the term is a multiplier, the selected values are added together before multiplying.

Choose **Limited Range** to specify a range of acceptable answers to the question. For example, for a Whole Number: 0–10. For a Date: Dec. 1, 2016–Jan. 1, 2017. This option is available only for numerical answer types (Numbers, Date, Money, Percentage, Quantity).

Response Required

You can choose from the following options:

- **Not Required** – Participants can leave the answer field blank. You use this option to create questions that can be implicitly answered by being left blank, such as “If your business is a publicly-traded corporation, how many shares of stock are outstanding?” Another example is questions about a product that not all invited participants produce.
- **Yes, Participant Required** – Participants must enter an acceptable answer or they get an error message.
- **Yes, Owner Required** – Participants see a read-only answer field. The project owner must answer the question before publishing the event. You can use this option to add data for internal analysis or reporting purposes. For example, you can specify an ID #, a classification code, or a shipping location. This option is useful for content stored in the content library and copied into many events. In this way, the internal buyer users of an organization must answer certain, internal facing, questions each time they create an event.
- **No, Owner Optional – Participant Cannot Respond** - Project owners can optionally enter a value. Participants see a read-only field.
- **Yes, Owner Required – Participant Optional** - Project owners must enter an acceptable answer or they get an error message. Participants can optionally enter a value.

Reference Documents

Click **Attach a File** and choose whether you want to upload a file from your computer or select a file from the content library. If you choose to upload, you can browse your hard drive or network for any file. If you choose to select from the content library, you can either search for a document title, or simply browse the hierarchy of content.

Visible to Participant

This option controls whether participants can see this section, item, question, term or attachment.

- Choose **No** to hide content from participants at all times. This option is only available if **Response Required** is set to **Yes Owner Required**, or **Not Required**. You use this option to hide content that you regard as confidential or sensitive from potential participants.
- Choose **Yes** to make the content visible to participants without restrictions. This option appears by default.
- Choose **Yes, after access gate is cleared** if you do not want participants to see this content item until after they have accepted the agreement and answered any prerequisite questions that restrict access to the event.

Your site can be configured to always hide content until participants accept the agreement and answer any prerequisite questions. In this case, the option **Yes, after access gate is cleared** is not available, and Yes always means that the content appears after the agreement is accepted and any access restrictions have been cleared. Contact SAP Ariba Customer Support for more information.

Also, you can use this option to create internal questions that the project owner must answer for internal use only. Place information that is invisible to participants after visible information, otherwise gaps appear in the hierarchical numbering viewed by participants.

Related Information

Prerequisite Questions [page 84]

Hide Participants' Responses from Each Other

When set to **Yes**, participants cannot see one another's responses. When set to **No**, participants can see one another's responses. This rule appears under the following conditions:

- The event rule "Show participant responses to other participants" is set to **Yes** or **After participant's first response is accepted**.
  If **Visible to participant** is set to **Yes**, this rule appears.
- The event rule **Hide the number of bidders by using the same participant alias** is **No- Unique Aliases**.

By default **Hide participants' responses from each other** is **Yes** in new event and **No** in events that have been migrated from previous releases in which this option did not exist.

Participant Can Add Additional Comments and Attachments

When set to **Yes**, comments allow participants to add additional information. For example, for a question whose answer must be a number, participants might have other information to communicate to you. If you enable this option, participants can write you a note explaining their answer. They can also upload an attachment as part of their comment.

Use Participant–specific Initial Values

With this option you can enter a different initial value for each participant. Participant-specific initial values allow you to preload each participant's event with specific, targeted values.

For example, you might ask "How quickly can you deliver?" knowing that the industry standard is five weeks. If you know that a participant is capable of delivering an order in three weeks, you can use a participant-specific initial value just for them.

If you do not enter a participant-specific value, participants see the default value specified in the Initial Value field. This allows you to set a global default value, and only enter a participant-specific value for selected participants.

> Note
>
> This option is not available for large-capacity events.
>
> By default, the user interface does not verify that an event owner specifies values for participant-specific initial values even if **Response Required** is set to **Yes, Owner Required**. To enforce required term values for participant-specifc values, the feature toggle SS-13186 must be enabled by SAP Ariba.

Team Access Control

This option allows you to control who can see the content element to which the Team Access Control applies. If you leave Team Access Control blank, anyone who can see the content can see this project and can see this content element.

If you specify a Team Access Control, only members of the team who have the specified access control can see the content.

Click the check boxes for the groups you want to grant access and click **Done**. The Owner has access to everything regardless of the Team Access Control. Keep in mind that this control relates to team members only. If you choose **Finance Information**, for example, members of the Finance group can only see this content if they or the Finance group itself, is a member of the team, as specified on the **Team** page.

> ⓘ Note
>
> - If the person who logs in to see the event or its reports does not have access to one or more content elements, then they are not visible. If the Price term is not accessible, for example, the **Scenario** and **Award** tabs on the event monitoring interface do not appear at all. The term is not included in reports that otherwise normally contain the term. It does not show up on the **Content** page or on any other page related to the event.
> - When you create a term, it is available for use in all line items. Therefore, if you set Team Access Control on a term, it applies to that term in every line item in which the term is used, as well as reports and all relevant tabs on the event monitoring interface.

You can choose from the following Team Access Controls:

Team Access Control	Limits Access To...
Classified	Members of the groups Classified Access, Internal Group, Contract Manager, Sourcing Manager, and Procurement Manager can view the object. ⓘ Note Contract Manager and Procurement Manager are not sourcing roles.
Finance Information	Members of the Finance group can view the object if the Finance Group or a member thereof is on the **Team** page.
Legal Information	Members of the Legal group can view the object if the Legal Group or a member thereof is on the **Team** page.
Owner Only	SAP Ariba Sourcing and guided sourcing event project owners and users in the Project Owner project group. **Owner Only** also means anyone who is allowed to manage projects, such as Commodity Code Managers, Commodity Managers, and Event Administrators can view the object.
Private to Team Members	Team members listed on the Team page can view the object.

Team Access Controls are affected by the controls set at a higher level. If any parent of this level has an access control set to **Private to Team Members**, then this team access control can only restrict access to those who are on the team.

For example, most templates have their access control (set from the Summary page's overview section) set to **Private to Team Members**. If you set access control for a price term to Finance, then you have to add the finance group (or someone in it) to the Team page.

If the project has no access control set at all, then access is free for all. You can set a price term Team Access Control to **Finance Information** and only the Owner and people in the finance group will be able to see it, regardless of the **Team** page.

Range

To limit the range of possible values, specify the upper and lower limits here. this appears for the following answer types: Whole Number, Decimal Number, Date, Money, Percentage, and Quantity.

Initial Value

Communicate your expectations to participants by setting a default value. For example, for the question “Is your company ISO-9000 compliant?” set an initial value of “Yes” to communicate your expectation that participants be ISO-9000 compliant.

Compete on Term

For lots you can specify on which term the participants are competing.

Use Initial Value As

This specifies how the initial value is to be used. The options are:

- **Ceiling** (or **Floor** or **Initial**) – This sets the highest value allowed. Floor is the lowest. For a Dutch auction, it is simply the starting (initial) bid.
- **Default** – This sets the price that appears when the participant first sees it, but there is no ceiling (or floor) and they are free to bid either higher or lower than this value.
- **Ceiling and default** – This the first value that they see and it is also the Ceiling (or Floor, for a forward auction).

Related Information

Ceiling/Floor/Initial Price [page 86]

Improve Bid Amount By

The options are **Percentage** and **Nominal amount**. If you set it to percentage the actual amount stays proportional to the value of the lead bid.

Bid Decrement

This is a percentage (%) if “Improve bid amount by” is percentage. Otherwise it is a value.

Can participants submit tie bids

If you choose **No tie bids**, keep in mind that a tie bid is for exactly the same amount. A bid for $10,000,000 and a bid for $10,000,001 are close, but not tied. To prevent bids that are that close, configure the more meaningful rule “Create buffer to protect lead bid” in the Rules section.

The **Can participants submit tie bids** rule does not apply to the preview period. However, if you select the **No tie bids** option, the “Can participants submit tie bids during preview” rule appears, which allows you to set the preview period differently.

If you select one of the options for **No tie bid for rank n (or better)**, the preview period works exactly the same way and the “Can participants submit tie bids during preview” rule does not appear.

The bidding rule **Break tie bids by submit time** works for 200 or fewer lots or line items. If you have more than 200 lots or line items, either choose to allow tie bids or choose **No tie bid for rank 1**.

Response Required for This Item or Lot

You can mark a response required for an item or a lot in parallel bidding events. To participants, required items or lots appear with a grayed out, display only check mark on the Select Lots page, and the items and lots are automatically included in the selection. Note that participants still must click **Submit Selected Lots** to be able to submit bids on required items.

Lots or items are indicated in the Microsoft Excel spreadsheet as required or not. This prevents participants from submitting a response to your event unless they included all required items or lots in the response.

If you select **Apply to all items or lots**, then this applies your setting to all existing items and lots in the event as well as to any future content added to the event. This also applies to content added from the content library. For example, if content in the document library is set to not require bidding, and the “Apply to all items or lots” flag is set to yes, then any content added from the content library will be set to require bidding.

You can change the value on any item or lot, or all items or lots after the event has been published. The change will be applied to any future bids.

Content from Article Master Data

If your site has the SAP Ariba Strategic Sourcing Suite, when article master data is uploaded, the **Content from Article Master Data** option is displayed on the **Add** drop-down menu when adding a line item on the **Content** tab of a sourcing event.

Selecting this option takes users to a search page where they can search for articles from the article master using typeahead text search and then using the filter options to filter search results.

Typeahead search matches and displays results for the first four characters typed. Searches are performed against article name, article ID, and category name. For example, depending on the contents of the article master data, a search for "chee" might return an item "cheese" and a category such as "Dairy", if cheese sat under the Dairy category.

Search results are displayed in a table with the following column headings:

- Type
- Description
- ID
- Category
- Site
- Base Unit of Measure
- Order Unit

When you perform a search, you can use filter options to narrow down your search results. Search results can be filtered on Categories, Site, and Article Type. Only characteristics that are associated with search results are displayed in the filter area. For example, if all the items returned in a search were associated with either Frankfurt or Zurich, then only Frankfurt and Zurich would be listed as filter options under Sites.

For more information about article master, see the *Common data import and administration guide*.

Category

When your site has the SAP Ariba Strategic Sourcing Suite, if a category attribute hierarchy was uploaded, the **Category** field is displayed when you select **Content** > **Add** > **Line Item** on a sourcing event.

Click the search icon beside the **Category** field to open a page that allows you to search for categories using typeahead search or browse categories. Attributes for the selected category are pulled into an **Item Terms** table on the **Content** page. You can enter values for the item terms, if required.

Typeahead search matches and displays results for the first four characters typed. Searches are performed against article name, article ID, and category name.

Items selected from the **Category** field are taken from the category attribute hierarchy. You can also select items using the **Commodity** field. Items selected from the Commodity field take their attributes from UNSPSC codes stored in the SAP Ariba system. If you select the same item from both the Category and Commodity fields, the item attributes are taken from the Commodity field selection. If you make changes to your selection in either of these fields, the item takes the attributes from the last field you changed.

Content for Multi-Stage Projects

You can create a multi-stage project that consists of sequence of multiple events in Quick Projects linked together.

To create a multi-stage project, you create multiple events as Quick Projects that are linked as predecessor and follow-on projects; this enables you to copy the content, suppliers, and bids from one event to the next.

A multi-stage project can be useful, for example, if you use an RFP to collect preliminary pricing information, and then run an auction to create competition and drive suppliers' bids down further. The RFP is the predecessor project to the auction.

If you specify a predecessor project when you create a new Quick Project, it creates a multi-stage project, and you can choose what to import from the predecessor project:

- Selected content
- Whether to copy participant invitations for the content being imported
- Whether to import participant responses as initial values (Ceiling, for example)
- Whether to import participant responses as initial bids

Importing data from a predecessor project is different from using **Copy from Project** on the project header, which does not include supplier response data.

Whether you specify a predecessor project or not, you can also copy other content from the content library. Either way, copying content a allows you to reuse it in events. It helps you by:

- Saving you from having to recreate identical content multiple times.
- Allowing you to standardize the questions you ask in your events. For example, if you must ask certain legal questions, create a library document including them.
- Aiding communication. If your organization has multiple employees creating many events, the content library enables them to share the content of their events.

> ⓘ Note
>
> Guided sourcing also supports multi-round bidding events. Unlike a multi-stage project, which consists of multiple events linked together, a multi-round bidding event is a **single** event with multiple bidding rounds.

Working with Event Conditions

Topics that explain how to create and edit conditions in events.

About Conditional Event Content [page 166]

Creating Basic Event Conditions [page 167]

Editing Basic Event Conditions [page 169]

Creating Advanced Event Conditions [page 170]

About Conditional Event Content

Conditional content provides a mechanism to define visibility conditions for questions, requirements, sections, and attachments. The content for which you have defined a visibility condition is only displayed to participants when they have fulfilled the condition that controls if that content is displayed to them.

Conditions can only be based on answers to questions. No other content type can be used to create a condition.

Conditional content is applicable to sourcing events, surveys, supplier profile questionnaire, and content documents in the sourcing library.

Initially, the participants cannot view content that is hidden by a condition. When the participants answer a question where their answer controls what other content will be displayed, the page refreshes and conditional content appears. That conditional content can be another question, a requirement, a section or an attachment.

Participants can export the content using Microsoft Excel. Only the visible content is exported, and more content may become visible after they have imported their updated spreadsheet back into the event, which they can export again and import after providing answers to the now visible content.

> Note
>
> - Visibility conditions can be set only on content that is visible to participants.
> - Conditional content is not supported for large-capacity events.
> - If scoring is enabled, un-answered questions are not counted towards the overall weight for the participant's score and you will not be able to distinguish if a question has not been answered because of a visibility condition, or because the participant did not answer it.
> - Conditions are defined based on questions within the same event. It is not possible to define conditions in an event based on responses to a previous event in the case of multi-round events.
> - You can set visibility conditions on table section level only, not on questions, attachments or requirements in a table section.
> - It is possible to define conditions based on only the basic profile of the participant or on the responses to the supplier profile questionnaire.
> - Visibility conditions cannot be applied to line items, lots, or sections that contain line items or lots.
> - It is not possible to select currencies for conditions matched to **Money** type fields.

About Advanced Event Conditions

Advanced conditions allow you to combine multiple questions and create AND (All of), OR (Any of), and NOT (None of) conditional expressions. Expressions can be stacked and nested in many possible combinations. Be sure you don't create conditions with logic that unintentionally contradicts itself.

Using "all Of" Expressions

An "All of" expression is an advanced expression that can include multiple expressions used for conditions that require all expressions to match. "All of" expressions might be useful with table section questions where you want to ensure a condition is met for all cells for that question.

Using “any Of” Expressions

An “Any of” expression is true if one or more of the fields defined in it are chosen. For example, if you define an “Any of” condition with four questions in it, that condition is true if the participants’ answers match from one to all four of those questions’ expressions.

Using “none Of” Expressions

A “None of” condition is true only if none of the expressions defined in it match. For example, if a participant does not have shipping centers in certain regions close to your manufacturing plants, you may want to display additional questions about their ability to fulfill your shipping requirements.

Creating Basic Event Conditions

Use this procedure to create basic event conditions.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

You can create basic conditions, which are based on one question, or advanced conditions that combine conditions on multiple questions. All conditions can be stored in the library along with the content and copied to events.

Procedure

1. On the **Add Question**, **Edit Question**, **Add Section**, **Edit Section**, **Add Table Section**, **Edit Table Section**, **Add Attachment**, **Edit Attachment**, **Add Requirement**, or **Edit Requirement** page, click **none** next to the **Visibility Conditions** attribute.

   If you have already created conditions, you can select a condition and apply it to your content.
2. Choose **Create Condition.** The **Create Condition** dialog box lists all available questions that you can use to build a condition. Multi-line answer type questions cannot be used to create conditions.

   For table sections, each cell in the table is listed as a selection for a condition. For example, if you have one question in a table section, and you have two columns in the table, then on the **Create Condition** page, you will see two choices to use in the condition, where the column label is listed in parenthesis next to the question.
3. Click the question you want to use in your condition.
   - For questions with numerical answer types or a date answer type, enter a From: and To: value in the **Expression** field to create a range of values.
   - For questions with a text answer type, enter the string to compare participants' answers to. The participant's answer must be an exact match to satisfy the condition.
4. Click **OK**.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
About Conditional Event Content [page 166]
Creating Event Content Items [page 79]
Editing Basic Event Conditions [page 169]
Creating Advanced Event Conditions [page 170]

Editing Basic Event Conditions

Use this procedure to edit basic event conditions.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

You can create basic conditions, which are based on one question, or advanced conditions that combine conditions on multiple questions. All conditions can be stored in the library along with the content and copied to events.

Procedure

1. On the **Content** page, choose **Edit** > **Conditions**.
2. Select the condition you want to edit.
3. Modify the name, add a description, or change the expression's **From** and **To** values.

Next Steps

You can add additional expressions to create a more advanced condition.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
About Conditional Event Content [page 166]
Creating Event Content Items [page 79]
Creating Basic Event Conditions [page 167]
Creating Advanced Event Conditions [page 170]

Creating Advanced Event Conditions

Use this procedure to create advanced event conditions.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Advanced conditions allow you to combine multiple questions and create AND (All of), OR (Any of), and NOT (None of) conditional expressions. Expressions can be stacked and nested in many possible combinations. Be sure you don't create conditions with logic that unintentionally contradicts itself.

Procedure

1. On the **Content** page, choose **Edit** > **Conditions**.
2. Click **Add** to create a new condition.
3. Enter a name, optional description, and click **Undefined** in the Expression box. Start either by selecting an option (question) or an expression (All of, any of, None of).
4. If you started to build your conditions using a question, enter values for that question, and click **Content Match.** The Create menu options are displayed.
5. Select an advanced expression, for example **Any of**. An **Any of** link appears to the left of the expression.
6. If you want to add nested expressions, select another advanced expression either from the **Content Match** link, or the **Advanced Expression** link. The new level is inserted to the left of the expression.

   You can add more levels, change an advanced expression, or delete a level by clicking on the expression's link. Note that you can only delete a level if you have deleted all content from the level.
7. Click **OK** and review the resulting expression on the **Edit Condition** page.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
About Advanced Event Conditions [page 166]
Creating Event Content Items [page 79]
Creating Basic Event Conditions [page 167]
Editing Basic Event Conditions [page 169]

Working with Sourcing Library Content

Topics that explain how to create sourcing library content and add it to events.

Importing Event Data from Predecessor Projects [page 172]

Copying Event Content from the Content Library [page 174]

Adding Supplier Profile Questionnaire Content to Events [page 176]

Creating New Sourcing Library Documents [page 178]

[Creating New Sourcing Library Documents from Past Events [page 179]]

[Editing Document Attributes in the Sourcing Library [page 181]]

[Uploading Files to the Sourcing Library [page 182]]

Importing Event Data from Predecessor Projects

Use this procedure to import event data from predecessor projects.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Importing data from a predecessor project enables you to connect multiple **Quick Project** type events. A predecessor project cannot be an event within a **Full Project**. For example, if you have two events (an RFP and an auction) within a **Full Project**, you cannot set the RFP as the **Predecessor Project** for the auction.

To create a multi-round event, create the first project. Later, when you create the second project, specify the first project as the **Predecessor Project** on the **Project-Creation** page.

Keep the following in mind when you import event data from predecessor projects:

- Clicking the check boxes only works if you have selected content to copy.

- **Copy participant invitations for content being copied** imports all participants from the predecessor project, regardless of whether they responded to the selected content. However, they are invited only for individual content items if you select those items.
- **Copy participant responses as initial values** means that a participant bid from the predecessor project becomes their ceiling/floor value in the successor project.
- **Submit participant responses as initial bids** automatically submits the bid for each content item for which there is a bid imported from the predecessor project. That bid becomes the participant's initial bid as soon as the bidding opens for that item.
- The participant response options do not appear until/unless the first event is **Completed** or **Pending Selection**. If the first event completes after you created this event, just refresh the page to see these two check boxes. You do not need to have permission to be a **Surrogate Bidder** to see the participant response options, when copying from a predecessor project.
- If you do not check any content you get an error that there is nothing to copy. For these check boxes to work you have to include at least one content item.

Procedure

1. In the second project, go to the **Content** page.
2. In the **Content** page, you may want to delete the content that is included as a default from the event template. Check the boxes to the left of the content to delete and click **Delete**.
3. Click **OK** to confirm deletion of the content.
4. Choose **Add** > **Content From Library**.

   Since the project knows that you have selected a predecessor project, it displays the content from that project for you to select. In addition, it provides check boxes so you can select additional data to import and what to do with it.
5. Click the check boxes for the desired import choices and the content you want to import and click **Copy** in the upper right corner to import the data.

   If you select **Cancel**, it changes the page to show the **Content Library**. You can return to this page later to add additional copies of predecessor content items or to switch to the **Content Library** to import content from there.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Creating Event Content Items [page 79]
Copying Event Content from the Content Library [page 174]
Copy bid currency types for conversion when copying events [page 571]

Copying Event Content from the Content Library

Use this procedure to copy event content from the content library.

Prerequisites

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)

⚠ Restriction

Only the content a participant is invited to participate in is visible to them. If a participant isn't invited to participate in a particular section, that content isn't displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

You can choose to copy content from an event that is in the **Content Library**, without making it a predecessor project. However, including this data isn't automatic. Event content is stored in content documents in the **Sourcing Library.**

Keep the following in mind when you copy event content:

- Clicking the check boxes works only if you have selected content to copy.
- **Copy participant invitations for content being copied** imports all participants from the predecessor project, regardless of whether they responded to the selected content. However, they are only invited for individual content items if you select those items.
- **Copy participant responses as initial values** means that a participant bid from the predecessor project becomes their ceiling/floor value in the successor project.
- **Submit participant responses as initial bids** means that for each content item for which there is a bid imported from the predecessor project, that bid is automatically submitted as the participant's initial bid as soon as the bidding opens for that item of content. Users must have the **Surrogate Bidders** permission to view this option.

ⓘ Note

When copying **Past Events** to contract line items document (CLID) from the **Add Content From Library** page, only the option **Copy visibility conditions for content being copied** is displayed. The options **Copy participant responses as initial values** and **Submit participant responses as initial bids** are not displayed, as these functions are not supported for copying events that include participant responses to the CLID.

- The participant response options don't appear until/unless the first event is **Completed** or **Pending Selection**. If the first event completes after you created this event, just refresh the page to see these two check boxes. You must have permission to be a **Surrogate Bidder** to see the participant response options, when copying from the **Content Library**.
- If you don't check any content, you get an error that there's nothing to copy. For these check boxes to work, you have to include at least one content item.
- By default, the **Team Access Control** values for terms in the content library document items are copied to the project. If the **Team Access Control** field is empty for a term in the content library, no access control is enforced (no permissions are required). An administrator for your site can set the Copy Term Permissions When Copying Items from Content Library [page 572] parameter to **No** so that **Team Access Control** values for terms in the content library are not copied to projects.

ⓘ Note

Pay special attention to currencies. If you copy content containing prices into a project that uses a different currency, the currency notation changes to the new currency, but there's no value conversion and the price amount remains unchanged.

ⓘ Note

If a user has deleted terms from a content document in the SAP Ariba Sourcing content library, the term's properties can be inherited from the event template when you copy that document into your event. The parameter `Application.AQS.RFX.CopyContentLibraryAttributePermissions` controls this behavior. If the parameter is set to **Yes**, the default, when you copy content library documents into an event, SAP Ariba Sourcing copies the term properties from the content library.

If the parameter is set to **No**, and if the event contains no line items when you copy an item from the content library to an event, then SAP Ariba Sourcing uses the term properties from the event template. If the event does contain line items when you copy an item from the content library to an event, then SAP Ariba Sourcing uses the term properties from the event. In either case, if the parameter is set to **No**, the term properties from the content library are ignored.

Procedure

1. While editing the event, on the **Content** page, choose **Add** › **Content From Library**.
2. On the **Add Content From Library** page, find the Sourcing Library document you want to import. Either Browse by the document by choosing **Explore Library**, or search for the document by choosing **Search Library or Events**.
3. Select the event or library document you want to copy and click **Select**.

   The content you can copy to your event is displayed on the Add **Content from Library** page.

4. Click the appropriate check boxes to copy forward specific lots and line items from the previous event.
5. Click **Copy**.

Results

You return to the **Content** page of the new event.

Next Steps

Verify that the information from the previous event is correctly copied forward by editing the individual line items and lots, and checking that the supplier invitation and ceiling price are set accurately in the List of Invited Suppliers area.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Creating Event Content Items [page 79]
Adding Supplier Profile Questionnaire Content to Events [page 176]
Site Configuration Options for Managing Events [page 561]

Adding Supplier Profile Questionnaire Content to Events

Use this procedure to add supplier profile questionnaire content to events.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Supplier profile questionnaire content is stored in the **Supplier Profile Questionnaire** document in the **Supplier Knowledge Area**. The supplier's profile is automatically updated with the event response once the bidding or response period has ended, even if you edit the content's title or whether or not it is required. If you edit the content's data type, however, the responses are not pushed to the supplier's profile.

You have the following options when copying supplier profile questionnaire content to an event:

- **Copy profile responses as initial values instead of automatically populating them in the participant's response** copies individual supplier profile values into the event as initial responses. If you have specified an initial response for the content in an event, these individual supplier responses from the profile will overwrite them.
- **Copy visibility conditions for content being copied** copies the visibility conditions associated with the profile questionnaire content. Make sure that the content you copy will be visible to the suppliers you want to respond to it in the event.

Procedure

1. While editing the event, on the **Content** page, choose **Add** > **Content From Library**.
2. On the **Add Content From Library** page, expand the **Supplier Knowledge Area**.
3. Select the **Supplier Profile Questionnaire** and click **Select**.
4. Click the check boxes next to the supplier profile questionnaire content you want to copy.
5. Click **Copy**.

Results

You return to the **Content** page of the new event.

Next Steps

Verify that the information from the previous supplier profile questionnaire is copied forward correctly.

Related Information

About Event Content [page 76]
Best Practices for Creating Event Content [page 79]
Creating Event Content Items [page 79]
Importing Event Data from Predecessor Projects [page 172]

Creating New Sourcing Library Documents

Use this procedure to create new sourcing library documents.

Prerequisites

You must be a member of one of the following groups:

- **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)
- **Limited Event Administrator** (access to this group must be approved by the SAP Ariba Market Coordination Team)
- **Sourcing Manager**

Context

Content stored in the content library is stored in content library documents.

Procedure

1. On the dashboard, click **Manage** > **Sourcing Library**.
2. Click **Actions** > **Content Document**.
3. Complete the **Create New Content Document** page and click **Create**.
4. Add your content, similar to when you create an event.

5. Click **Done**.

Results

The **Sourcing Library** page displays with the newly created content document added.

Related Information

About Event Content [page 76]
Creating New Sourcing Library Documents from Past Events [page 179]
Editing Document Attributes in the Sourcing Library [page 181]
Uploading Files to the Sourcing Library [page 182]

Creating New Sourcing Library Documents from Past Events

Use this procedure to create new sourcing library documents from past events.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Content stored in the content library is stored in **Content Library Documents**.

Procedure

1. On the dashboard, click **Manage** > **Sourcing Library**.
2. Click **Actions** > **Content Document**.
3. Complete the **Create New Content Document** page and click **Create**.
4. Choose **Add** > **Content from Library**.
5. In the **From** field, click **Past Events**.
6. Search through the past events to find the correct event. Choose it and click **Select**.
7. Select the content that you want to copy into the new library document. Note that the hierarchal structure of the content is in force. For example, if you choose to copy a certain line, you also copy all content nested in that line.
8. Click **Copy**. The **Create Content** page displays with the selected event content added.
9. Modify the content if required.
10. Click **Done**.

Results

You see the **Sourcing Library** page with the newly created content document added.

Related Information

About Event Content [page 76]
Creating New Sourcing Library Documents [page 178]
Editing Document Attributes in the Sourcing Library [page 181]
Uploading Files to the Sourcing Library [page 182]

Editing Document Attributes in the Sourcing Library

Use this procedure to edit document attributes in the sourcing library.

Prerequisites

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)

> **Restriction**
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

Normally only the creator of a content library document is able to edit it. However, the document owner can grant edit access to add additional users by setting the **Editors** field.

Procedure

1. On the dashboard, click **Manage** > **Sourcing Library**.
2. Find the document you want to edit.
3. Click the document's name and choose **Edit Attributes**.
4. On the **Details** page, set the **Editors** field to the group or user that you want to grant edit access. Note that you can select only one group or user.

Results

The specified user or group can now edit your content library document.

Related Information

[About Event Content [page 76]]
[Creating New Sourcing Library Documents [page 178]]
[Creating New Sourcing Library Documents from Past Events [page 179]]
[Uploading Files to the Sourcing Library [page 182]]

Uploading Files to the Sourcing Library

Use this procedure to upload files to the sourcing library.

Prerequisites

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)

> ⚠ Restriction
>
> Only the content a participant is invited to participate in is visible to them. If a participant is not invited to participate in a particular section, that content is not displayed in an exported Microsoft Excel spreadsheet, such as a survey.

Context

You can also store files in the content library. For example, you can store a Microsoft Word document containing the default legal terms your organization applies to events. If the terms change, your legal department can simply upload a new version of this document, and users will automatically access the new version. Or perhaps your organization adds a certain file as an attachment to many events. Upload that file to the Sourcing Library, and all users can easily access it.

Procedure

1. On the dashboard, click **Manage** > **Sourcing Library**.
2. On the **Sourcing Library** page, click **Actions** > **Create** > **Document**.
3. On the **Create New Document** page, you can either upload a new document on the **New Document** tab, or you can click the **Copy Document** tab to create a new copy of an existing document.
   - Set the base language of the document's description.
   - Check **Announce the creation of this new document** to add an **Announcement** to the **Home** dashboard of all sourcing library team members who have the library marked as a **Watched Project**.

Related Information

About Event Content [page 76]
Base Language [page 272]
Creating New Sourcing Library Documents [page 178]
Creating New Sourcing Library Documents from Past Events [page 179]
Editing Document Attributes in the Sourcing Library [page 181]

Working with Event Types

Bid Transformation Auctions

Bid transformation allows you to transform participants' bids by adding cost terms you define. These terms can be different for different suppliers, such as adding an import duty for one supplier and a switching cost for another. Yet it enables each bidder to see a “bid to beat” that is adjusted for them.

About Bid Transformation Events

Bid transformation is useful for:

- Helping you to fairly and consistently factor the differences between suppliers and their offerings into your awarding decisions.
- Bringing dissimilar suppliers and their offerings into competition.

You use bid transformation to create competition even though the total cost of doing business with different suppliers is composed of different cost components. For example, you invite suppliers from country/region AAA and country/region BBB to bid on the price of parts for a US manufacturing company. The US charges a higher import duty on parts from country/region AAA, but the parts are cheaper. How can you figure out if they are cheap enough? Bid Transformation can compare your total cost for each bidder, even when prices and other components vary widely.

Bid transformation allows participants to see the auction from their own perspective:

- Participants see their own prices as they enter them.
- The bid that they have to beat is adjusted to their own cost transformation.
- You see participant bids and the cost to you for each participant.

With bid transformation events, you specify adjustments to cost components **before** bidding opens for an event. If you're using product sourcing (a collection of features in SAP Ariba Strategic Sourcing Suite) and grading and scoring, you can use the bonus-penalty [page 516] feature. The bonus-penalty feature is typically used to assign bonuses or penalties to participant responses after bidding closes for an event.

> Note
>
> The rule **Show calculated value of competitive term before participant submits bid** is not compatible with bid transformation events.

Forward Auctions with Bid Transformation

In a forward auction, participants' bid prices (buy prices) can be very different, but when your costs are taken into account, your total selling cost for their goods or services is very similar.

For example, you might have negotiated with participants and agreed to pay the costs to ship their purchases to them. Suppose that one of the participants is based in the United States, and the other is based in France. Since you have agreed to pay the shipping costs, the participants based in France must offer a higher bid if you are to earn the same profit by selling to them.

The Forward Auction with Bid Transformation template allows you to design an auction to bring the two participants into competition. You set up the auction to automatically include the shipping costs in the prices that the participants bid.

Related Information

Grading and Scoring
SAP Ariba Product Sourcing Guide

Differences Between Bid Transformation and Total Cost Auctions

In a total cost event, the participants can edit the cost components. In a transformation event, they cannot because the cost components are not visible to them. When a template sets the Bid transformation flag, it creates several effects:

- The project owner can set up cost components that modify bids to arrive at a total cost. Participants cannot see these cost components.
- The cost components can be different for different suppliers. For example, one incurs a switching cost, another requires an import duty, a third has a different import duty. The cost components can include other adders, subtracters, multipliers, and % discounts.
- Bid transformation auctions have only one cost component to bid on. The other cost components are not visible to them. In a total cost auction, participants bid on the item price and other cost components that contribute to the total cost.
- In bid transformation auctions, the bid to beat is adjusted for each participant according to the cost components you added.
  In total cost auctions, the cost components are not hidden and all participants see the same bid-to-beat.
- In bid transformation auctions, the bid decrement value is adjusted for each participant, so that each sees a different bid decrement value. In total cost auctions, the bid decrement value is not adjusted.

Related Information

Bid Transformation Example [page 198]

Cost Terms

You use cost terms to transform suppliers' bids into your costs.

About Cost Terms

Your sourcing solution transforms suppliers' bids into your costs using a formula you define. The basic formula is:

```
Your cost = (price * multipliers) + adders
```

Your sourcing solution models the adder and multiplier terms of the formula using cost terms, a type of line item term.

When creating cost terms, verify that they are behaving as you intend by validating the changes in suppliers' Ceiling Price using Supplier View.

Adder, Subtracter, Multiplier, and % Discount Cost Terms

Cost terms include adders, subtracters, multipliers, and percent discounts.

Adders

Adders represent costs that you incur by working with a supplier. Adders are simply added to the supplier's bids during the auction. The cost of switching suppliers is an example of an adder. Adders and multipliers force suppliers to lower their bids in order to compete.

For example, if the preparation or processing cost for some commodity is different for different suppliers, place an adder `processing costs` into the transformation equation:

```
Your cost = price + processing
```

Define in advance the different processing costs for each supplier in the List of Invited Suppliers area. When transforming a supplier’s price into your cost, the supplier-specific costs you define are inserted.

Subtracters

Subtracters represent savings that you gain by working with a supplier. Subtracters are simply taken off of a supplier's bids during the auction. You use subtracters and percent discounts to reward suppliers who are cheap to work with. Since you save money by working with these suppliers, they remain competitive even when charging a higher price.

Subtracters are costs that subtract from the supplier’s price. You might use a subtracter to model a supplier refund. For example, if a supplier offered to pay $5 of the shipping for each item you buy, you can create a subtracter cost term shipping refund.

> **Note**
>
> You can also create a subtracter by entering negative values into an adder.

Multipliers

Multipliers also represent costs that you incur by working with a supplier. They cause suppliers bids to be multiplied by a certain number. Sales tax is a multiplier. Adders and multipliers force suppliers to lower their bids in order to compete.

The example used earlier of adding a percentage for import duty also works for sales tax. The formula is:

```
Your cost = (price * (1+import duty/100)
```

ⓘ Note

To cause a multiplier to have no effect, set it to 1. If you set it to be greater than 1, it acts as a cost and penalizes the supplier. You can also reward the supplier (and cause the multiplier to act as a percent discount) by setting it between 1 and 0.

Percent Discount

Percent discounts represent savings that you gain by working with a supplier. Percent discounts cause suppliers' bids to be reduced by a percentage. You use subtracters and percent discounts to reward suppliers who are cheap to work with. Since you save money by selecting these suppliers, they remain competitive even when charging a higher price.

For example, a certain supplier consistently delivers a week early. You might reward this supplier by creating a % Discount `early delivery award`. To lower the supplier's cost by 5%, set the % Discount term to 5%.

Creating New Event Cost Terms

Use this procedure to create new event cost terms.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Suppliers' bids are transformed into your costs using a formula you define. The adder and multiplier terms of the formula are modeled using cost terms, a type of line item term.

Procedure

1. Edit the line item or lot by clicking the check box to the left of its name and choose **Edit** > **Content**.
2. On the **Edit Item** or **Edit Lot** page, in the **Lot** or **Item** terms section, choose **Add** > **Term**.
3. On the **Add Term** page, click **New Term**.
4. On the **New Term** tab, enter the name of the cost term.
5. Configure the options for the new term.
6. If you are creating an adder or subtracter, set the **Initial Value** field to 0. If you are creating a Multiplier or % Discount, set the **Initial Value** field to 1.
7. In the **List of Invited Participants** area at the bottom of the **New Term** tab, fill in the value of the cost term for each supplier.

   You can also enter the supplier–specific values for cost terms on the **Cost Terms** tab of the **Content** page.
8. The **New Term** tab displays.
9. Click **OK** to create the cost term.

   When you return to the **Content** page, the new term appears.
10. Click the **Fx** link next to the **Total Cost** figure. Now the total cost formula is filled in with the term you created.

Next Steps

When creating cost terms, verify that they are behaving as you intend by validating the changes in suppliers' **Ceiling Price** using **Supplier View**.

Related Information

Creating Bid Transformation Events [page 193]
About Cost Terms [page 186]
Validating Event Cost Terms in Supplier View [page 190]
Manually Defining Event Ceiling Prices [page 191]

Validating Event Cost Terms in Supplier View

Use this procedure to validate event cost terms in supplier view.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Once you have created the cost term and entered the specific values for each supplier, ensure that it works correctly.

Since the point of a transformation auction is to create competition by equalizing your total costs, unless overridden, your sourcing solution ensures that each supplier's maximum possible bid, plus costs, equals the value you define as your maximum total cost for the line item. The supplier's maximum possible bid is also called the **Ceiling Price**. In effect, in a transformation auction each supplier has a different *Ceiling Price*.

Procedure

1. On the **Content** tab of the **Content** page, choose **Actions** > **View As Participant**.
2. Click the name of one of the suppliers invited to the auction.
3. Check to see that the ceiling value is equal to the value that you calculated with the transformation formula.

Related Information

Creating Bid Transformation Events [page 193]
About Cost Terms [page 186]
Creating New Event Cost Terms [page 188]
Manually Defining Event Ceiling Prices [page 191]

Manually Defining Event Ceiling Prices

Use this procedure to manually define event ceiling prices.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

You use this option to define a different ceiling price for each supplier. For example, if you have previously-negotiated prices with each supplier that they expect to see.

Procedure

1. Edit the line item for which you have defined cost terms.
2. Click **Set Participant–Specific Values**, located at the bottom of the **Item Terms** area.

   The **Price** column appears in the **List of Invited Participants** area at the bottom of the page.
3. In each supplier's **Price** field, you can enter your value for the ceiling price.

Related Information

Creating Bid Transformation Events [page 193]
About Cost Terms [page 186]
Creating New Event Cost Terms [page 188]
Validating Event Cost Terms in Supplier View [page 190]

Applying Cost Terms to Single Units or to All Units

Line items have an associated quantity. You can apply cost terms to the price of a single item in a line item (cost per unit) or to the price of the line item as a whole (the extended price, or the price times the quantity).

Per Unit

Per unit cost terms are applied to prices before multiplying the price by the quantity. For example:

```
Buyers cost = (price + per-unit adder) * quantity
```

All Units

All Units cost terms are applied to the extended price of a line item. The extended price of a line item is the price times the quantity plus all units cost terms. For example:

```
Buyers cost = price * quantity + all-units adder
```

The rules of algebra dictate that multiplication operations are calculated first, so parentheses around price * quantity is redundant.

Multipliers (All Units)

Suppose that a certain percentage of all the parts you buy is of low quality. You can create an all units multiplier low quality penalty. This way, the total cost includes shipping costs for the extra coal you must buy. For example:

```
Buyers cost = price * quantity * penalty
```

Summary of Cost Term Concepts

There are two basic rules:

- Per Unit cost terms are applied before price is multiplied by quantity.
- All Units cost terms are applied after price is multiplied by quantity.

When adders and multipliers are used together, there are four possibilities:

	Adder: per unit	Adder: all units
Multiplier: per unit	(price * multiplier + adder) * quantity	(price * multiplier) * quantity + adder
Multiplier: all units	(price + adder) * multiplier * quantity	(price * quantity) * multiplier + adder

You can also combine (these possibilities:

price * per_unit_multiplier + per_unit_adder) * quantity * all_units_multiplier + all_units_adder

Creating Bid Transformation Events

Only certain situations are appropriate for the use of bid transformation. It makes sense to hold a transformation auction when you have two or more suppliers that can provide you with the same good or service, but at different cost to you.

You use the following steps to create an auction with bid transformation:

- Step 1: Create Event and Add Line Items [page 194]
- Step 2: Create New Cost Terms [page 194]
- Step 3: Validate Cost Terms in Supplier View [page 194]
- Step 4: Override Transformed Ceiling Value (Optional) [page 194]

Related Information

Bid Transformation Strategy [page 195]

Step 1: Create Event and Add Line Items

Create the event following the standard procedure. Create an auction, and choose the **Reverse Auction with Bid Transformation** template.

When you arrive at the **Content** page, create lots or line items to solicit pricing information for the goods or services you want to buy.

Click the **Fx** link at the right to see what the extended price is to start.

The formula consists of **Price * Quantity** because you have not created any cost terms yet.

Related Information

Creating Sourcing Events Without a Sourcing Request [page 32]

Step 2: Create New Cost Terms

The next step is to create the cost terms.

Step 3: Validate Cost Terms in Supplier View

Once you have created the cost term and entered the specific values for each supplier, ensure that it works correctly.

Since the point of a transformation auction is to create competition by equalizing your total costs, unless overridden, your sourcing solution ensures that each supplier's maximum possible bid, plus costs, equals the value you define as your maximum total cost for the line item. The supplier's maximum possible bid is also called the **Ceiling Price**. In effect, in a transformation auction each supplier has a different **Ceiling Price**.

Related Information

Step 4: Override Transformed Ceiling Value (Optional) [page 194]

Step 4: Override Transformed Ceiling Value (Optional)

Use this option to define a different ceiling price for each supplier. For example, if you have previously-negotiated prices with each supplier that they expect to see.

Events with a Large Number of Line Items

There are commodity areas such as transportation and packaging which requires you to collect price quotes for thousands of items from a huge number of suppliers. Typically, a buyer would use RFPs to collect information for a large number of line items. However, you can run an auction for a large number of line items when you require to collect detailed item pricing post bid. When there are a large number of items or questions for suppliers to respond to, it may be necessary to enter the pricing or answers offline. In such scenarios, its a good practice for buyers to collect supplier quotes using Microsoft Excel in an offline fashion.

For example, if you have large line items such as office supplies or corrugate/paper packaging, you can plan a large line item event as an RFP or an auction. However, collection and management of huge amounts of data can be cumbersome for large line item events. Users can select one of the following options to manage data collection and analysis:

- Large-capacity RFPs. For additional information, see Using Large-Capacity RFPs [page 508].
- Custom response sheets. Custom response sheets enable you to create a customized Excel sheet to collect pricing in a good format that would aid in your post event analysis in Microsoft Excel. You can also use supplier specific sheets to make suppliers bid below their current prices. For additional information, see Using Custom Offline Response Sheets [page 413].

Bid Transformation Strategy

The strategy of bid transformation is to not only cause suppliers to compete on your costs, but also to do it in such a way so as to bring suppliers into competition with one another and create a unified market where none existed before.

> ⓘ Note
>
> You might find that it is not possible to create this kind of competition. If even after the costs are taken into account, the companies cannot offer similar prices, then competition cannot take place and it is recommended that you reevaluate your decision to use bid transformation.

These sections describe auctions with bid transformation:

Thinking About Bid Transformation

When quantifying your factors, it is important to understand the difference between soft and hard costs.

- Soft costs: costs based on perception, judgement, or experience; costs that are not quantifiable

- Hard costs: quantifiable costs or expenses

Example of Soft Cost

I prefer to work with local suppliers because I think they give better service.

Examples of Hard Costs

If I work with an overseas supplier, I will have to pay for:

- Extra transportation costs
- Site visit costs (6 per year) or
- Relocation costs for one year

Each supplier's cost can be calculated as a real factor and used as an adder to their bid.

When considering bid transformation, it is important to focus on hard costs that you can quantify for both you and your suppliers.

When determining your costs:

- If your initial assessment indicates that you are dealing with soft costs (often the case with quality assessments), consider having your technical proposals reviewed by your engineers who might be able to help quantify differences into real costs.
- Ensure that there is an incremental value for the transformation, not artificial distinctions that really do not factor into your award decisions.

The intent is to bring suppliers' bids into real competition, even when the goods and services are different, not separate the bids. That can predispose the outcome and stifle competition.

Bringing Dissimilar Products into Competition

When you are buying commodities, you can use bid transformation to place different commodities into direct competition. For example, coal, which has different purity or quality levels. You use bid transformation to transform the value per ton of coal to make lower quality coal worth less.

Commodity	Quantifiable Terms
Fuel Sources or Chemicals	Factors like purity or heat output
Engineered Items	The long-term value of the equipment's efficiency, engineering compliance, and constructability; then adjust in relation to the optimal requirements for each factor.
Services	The experience of the workforce, capability of the organization, and financial strength of the company.

Bringing Dissimilar Suppliers into Competition

The previous table presented ways to bring dissimilar products into direct competition. The following table presents ways to bring dissimilar suppliers (for example, more or less experienced, or existing in a different geographical place) into direct competition.

Point of Dissimilarity	Solution
Transportation costs	These costs can vary between different suppliers, especially if some suppliers are overseas. Quantify the additional transportation costs and add those costs to a supplier's bid in the auction. This can include duties and customs charges if dealing with overseas suppliers.
Performance	Difference equipment solutions can meet the same functional requirements. Reward higher outputs or efficiencies, higher reliability rate, or greater feature sets.

Other possible cost terms might include capital cost, depreciation, tax shields, payment terms, risk, travel, and quality inspection.

Starting/Reserve Price Guidelines

If suppliers are unable to meet the starting or reserve prices that were set for them, examine how you quantified your factors. Were they based on real hard costs or perception? If you cannot quantify the costs fairly for suppliers, you might have set them too high, which prohibits participation and competition.

If you feel that your factors were quantified in a true cost manner and the supplier cannot adhere to your prices, consider not inviting that supplier to participate in the auction. You need to ensure that you are working with qualified suppliers who can meet your business needs.

Communicating About Bid Transformation to Suppliers

It might not be in your best interest to disclose all the cost terms to the suppliers participating in your auctions, especially if the nature of the bid transformation is to give certain suppliers advantages.

Use the following guidelines to communicate with your suppliers:

- Tell suppliers that you are doing a total cost evaluation to ensure that all suppliers are evaluated fairly. Bid transformation ensures that you compare suppliers' offerings fairly.
- Tell suppliers that their standards, quality, or location are important and that bid transformation gives them appropriate credit for these factors.
- If suppliers want to know what the exact factors are and how they are calculated, simply tell them that numerous criteria were considered and calculated based on true costs to your organization.

If you do decide to communicate with suppliers the exact basis of your factors, do so before the auction gets started to avoid questions and concerns during your bid.

Suppliers might question the bid transformation process. Giving your suppliers too much information or incorrect information about the format can cause them to lose interest and suspect that your markets are not run with integrity and fairness. The most typical solution to supplier resistance is to set up the Market Feedback rules to only display rank, thus masking the transformation altogether.

Common Problems

Auctions with bid transformation work best when you can quantify data that is necessary for making award decisions. Setting up bid transformation for the wrong reasons or with inaccurate data can cause a number of problems. For example:

- If you do not calculate your factors based on real costs, you might set them too aggressively. Setting factors too aggressively can create an unfair market which causes:
  - Suppliers to lose interest because they feel they cannot meet your requirements.
  - Less competition as potential competitors fail to interact.
- If you do not calculate your factors based on real costs, you might set them too leniently and misjudge the true costs to work with a specific suppliers. This leads to poor award decisions.

Bid Transformation Auction Templates

The following templates allow you to create bid transformation auctions:

- **Dutch Forward Auction with Bid Transformation**
- **Dutch Reverse Auction with Bid Transformation**
- **Forward Auction with Bid Transformation**
- **Reverse Auction with Bid Transformation**

You can create a copies of the bid transformation templates and customize them even further.

Bid Transformation Example

For example, you set up an auction with bid transformation with the following characteristics:

- There is an import duty of 8 percent on parts from Company A, A.K. Consultants.
- There is an import duty of 5 percent on parts from Company B, Apex Corporation.
- The ceiling price for a crate of parts is $10,000.
- The bid decrement and buffer values are all $100.

When A.K. Consultants starts bidding they see a ceiling value of $9,259.25. They do not see the 8 percent you will add to make the ceiling price of $10,000. The bid decrement they see is $92.60. Note that the bid transformation feature has transformed both values to hide the cost component you added for them.

The highest bid A.K. Consultants can submit is $9,259.25.

When Apex Corporation logs in to bid, they see the leading bid and the required decrement transformed into their own terms.

The required decrement is $95.24. When the bid transformation adds Apex Corporation's transformation of 5 percent, it comes out to about $100. At this point A.K. Consulting sees the leading bid as $9,166.65.

The buyer sees these bids as the adjusted costs. Fractions of a cent are not computed.

So, bid transformation transforms participants' bids into your total cost as an adjusted value that is different for each participant.

Event Total Cost Formulas

Total cost modeling is a way of accounting for the costs of a bid that are in addition to the bid's simple price. Total cost lets buyers or category managers include all the factors they need to assess and compare the total cost of ownership of the goods and services that they source.

About Event Total Cost Formulas [page 199]

Testing Event Total Cost Formulas [page 201]

About Event Total Cost Formulas

A **Request for Proposal with Total Cost** is used to qualify suppliers or collect pricing information. You can add cost factors such as taxes or shipping costs and calculate the total cost for each supplier. You can score each supplier and decide whether they can see one another's responses.

Being able to see the cost components and total cost is a key factor when comparing suppliers. Total cost applies to a broad range of cases, including the following:

- Total system cost
- Fixed-plus-variable cost
- Switching cost

By breaking out the cost components and examining them under different scenarios, total cost helps identify new opportunities for sourcing savings. Total cost is defined as the addition of multiple cost components for an item. Each cost component consists of individual cost items (or terms), combined arithmetically, which are then applied to the line items in your auction. For example:

```
Component = Term1 + Term2 * (Term3 + Term4) – Term5, [...]
Total Cost = Component1 + Component2 + Component3, [...]
```

You can apply different total cost formulas to different line items. You can also apply the same formula to a group of line items. A standard set of cost terms is tracked in the system by default, such as price and quantity. The project owner can create other cost terms when they create the event.

When you create a term in a project that uses the **Total Cost** template, it enables you to specify whether the term is to be included in cost. If so, you can also specify whether it is to be treated as an adder, subtracter, multiplier or percent discount. You can also specify whether these then apply to each price unit individually, or all units taken together. Within each line item any such terms are automatically applied to the *Total Cost* term.

Sample Auction Business Case

Consider the following business case:

You own a brewery and want to create an auction event for beer bottles. You are considering switching from your incumbent supplier, but you know that switching to a new supplier will be an additional cost for you.

You also want your vendor to manage your inventory of bottles, so you request a quote on inventory charges per case of bottles.

The first step in creating this total cost event is to identify the terms that have an impact on total cost. In this business case, the following cost components might impact your total cost:

- Switching cost
- Inventory cost

The switching cost will depend on which supplier you choose. The inventory cost depends on the quote the supplier provides for that negotiable term.

How Bid Transformation and Total Cost Auction Differ

In a total cost event the participants can edit the cost components. In a transformation event they cannot because the cost components are not visible to them. When a template sets the Bid transformation flag, it creates several effects:

- The project owner can set up cost components that modifies bids to arrive at a total cost. Participants cannot see these cost components.
- The cost components can be different for different suppliers. For example, one incurs a switching cost, another requires an import duty, a third has a different import duty. The cost components can include other adders, subtracters, multipliers, and % discounts.
- Bid transformation auctions have only one value to bid on. The other costs are not visible to them. In a total cost auction participants bid on the item price, and other costs that contribute to the total cost.
- In bid transformation, the bid to beat, is adjusted for each participant according to the cost components you added.
  In Total cost, the cost components are not hidden and all participants see the same bid-to-beat.
- With **Bid Transformation**, the bid decrement value is adjusted for each participant, so that each sees a different bid decrement value. **Total Cost** auctions do not adjust bid decrement value.

Related Information

Bid Transformation Example [page 198]

How Total Cost Auction and RFP with Price Breakdown Differ

For an RFP with price breakdown, suppliers do not enter the value of the Price term; they supply the values of price components and the price is calculated by adding them.

For Total Cost, suppliers provide the Price and other terms that you define as adders, subtracters, multipliers, and dividers, each on a per-unit or per item basis. This enables you to create much more elegant Total Cost calculations, which the price breakdown method cannot duplicate.

How a Total Cost Auction and Total Cost RFP Differ

A request for a proposal and an auction are fundamentally different. These differences are apparent in the options that are allowed for projects using these two sourcing event templates. In the list below a capability listed for one type of project means the other type behaves in the opposite way.

- A **Total Cost Auction** provides for prebid period, multiple lots, or overtime bidding periods.
- A **Total Cost Auction** provides a **Bid Guardian Percentage** and requires bid improvement.
- A **Total Cost Auction** allows the buyer to decide whether to use a starting gate.
- **Total Cost Auction** allows the buyer to show participants the lead bid and participant-specific initial values.
- **Total Cost Auction** allows the buyer to show participants their rank.
- **Total Cost Auction** defines two types of lots that the RFP does not have:
  - “Bid at Item level, compete at Lot Level (collect item pricing during bidding)”
  - “Bid at Lot level, compete at Lot level (collect item pricing post bidding)”
- A **Total Cost RFP** allows scoring on participant responses.
- The **Total Cost RFP** defines a **Cost Term**, also called **Total Cost** that uses the **AGGREGATECOSTS** function.
- A **Total Cost RFP** team can include **Team Graders**.

Related Information

Aggregate Costs (AGGREGATECOSTS) [page 145]

Testing Event Total Cost Formulas

About Testing Event Total Cost Formulas

You can test the total cost formula with test values per supplier. In addition, you can also test the historic values to ensure that savings are calculated correctly.

What Happens During the Evaluation Phase

This section describes what happens to your total cost formula during the evaluation phase of the event process.

Viewing a Comparison of Cost Components and Total Cost

During supplier bidding and evaluation, the results of the various item-level total cost formulas are summed or "rolled-up" to arrive at an event grand total.

Separating total cost formulas into components allows the side-by-side comparison of suppliers' responses, on a per-component basis.

Frequently Asked Questions

This section provides answers to frequently asked questions about the total cost feature.

Can I Add a Cost to One Supplier but Not Others?

Yes. This is called a supplier specific cost.

Can I Specify More than One Supplier Specific Cost?

You can only add one supplier specific cost per item, but you can specify more than one supplier specific cost per cost component.

What Is a Cost Component?

A cost component is an element of a formula used to calculate total cost. Each cost component consists of individual cost items (or terms), combined arithmetically, which are then applied to the line items in your event

I Changed My Cost Formula, but the Changes Did Not Save. Why?

When you change your formula, make sure to click **Save** before you click **OK**.

I Added Suppliers to an Event After I Launched the Event. Can I Add Supplier Specific Costs for These New Suppliers?

No. And you cannot edit your cost formula after you launch the event.

How Do I Control What Total Cost Information Shows Up for Buyers and Suppliers? Do I Have to Show Suppliers What Their Total Cost Is?

Buyers can see everything, but what suppliers can see is determined by permissions. You do not have to show suppliers their total cost.

Can You Add Costs That Are Not Dependent on a Supplier's Response or Profile Attribute?

Yes, the buyer can define a constant to enter a supplier-specific attribute.

Can Total Cost Amounts Be Used in Scoring Designs?

Yes, you can score on total costs, but you cannot apply costs to the score.

Can I Include a Cost Component That I Have Already Created as a Cost in Another Component Formula?

No.

Testing Event Total Cost Formulas

Use this procedure to test event total cost formulas.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

You can test the total cost formula with test values per supplier. In addition, you can also test the historic values to ensure that savings are calculated correctly.

Procedure

1. Select a component from the equation to test.
2. Enter test values in the fields provided or click **Set Participant-Specific Values**.
3. Do one of the following:
   - To test the selected component only, select **Current Component** from the **Test** menu.
   - To test the entire cost formula, select **Total Cost Formula** from the **Test** menu.

Next Steps

Reset the test values to run another test of another value or another component.

Related Information

About Testing Event Total Cost Formulas [page 201]
Testing Historic Event Total Cost Formulas [page 205]
Comparing Event Cost Components and Total Costs [page 206]

Testing Historic Event Total Cost Formulas

Use this procedure to test historic event total cost forumals.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

You can test the total cost formula with test values per supplier. In addition, you can also test the historic values to ensure that savings are calculated correctly.

Procedure

1. Click the **Set all terms to be historic price** check box.
2. Select **Current Component** or **Total Cost Formula** from the **Test** pull-down menu.

Next Steps

Reset the test values to run another test of another value or another component.

Related Information

About Testing Event Total Cost Formulas [page 201]
Testing Event Total Cost Formulas [page 203]
Comparing Event Cost Components and Total Costs [page 206]

Comparing Event Cost Components and Total Costs

Use this procedure to compare event cost components and total costs.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

You can test the total cost formula with test values per supplier. In addition, you can also test the historic values to ensure that savings are calculated correctly.

Procedure

1. On the **Home** dashboard, click **Status** > **Monitor**.

2. Choose your event.
3. On the **Items** tab, from the **Display** menu, choose **Total Cost** or **Unit Cost**.
4. Click **Show Details** to see the cost components for each bid or response.

   You can also monitor the total cost of bids or responses on the **Activity** tab and **Suppliers** tab.

Related Information

About Testing Event Total Cost Formulas [page 201]
Testing Event Total Cost Formulas [page 203]
Testing Historic Event Total Cost Formulas [page 205]

Setting Up Total Cost Auctions or RFPs

Topics describing how to set up total cost auctions.

Creating Total Cost Auctions or RFPs

Use this procedure to create total cost auctions or RFPs.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Total cost events enable you to include factors other than price, such as shipping cost, taxes, and the cost of switching to a new supplier. The total cost can expressed in a formula, such as:

Price * quantity + shipping + taxes + switching

You can configure different values for cost components for each supplier or participant ("participant-specific values"). For example, there is no switching overhead for suppliers you already work with (incumbent suppliers), so for incumbent suppliers you'd assign a zero value for switching.

You determine whether the values for cost factors are to be provided by the suppliers during the event, whether you want suppliers to see only their own rank, their own rank and the lead bid, or all supplier responses. Supplier ranks are based on the unit cost. Suppliers see their total cost and unit cost. They also see the cost terms that you made visible for them.

The following procedure shows you how to create an auction or RFP, and set the price and quantity for an item. It also shows how to add a custom term to the item that will be used in your total cost formula.

Procedure

1. On the dashboard, click **Create** > **Sourcing Project**.
2. For the event type, choose **Auction** (or **RFP**).
3. From the list of event templates, choose **Total Cost Auction** (or **Request for Proposal with Total Cost**).
4. Set the event rules for this auction.
5. Set up the event team.
6. Invite participants to the event.

Next Steps

You are now ready to configure the total cost auction content.

Related Information

Setting Up Total Cost Auctions or RFPs [page 207]

Creating Event Total Cost Content [page 209]
Seeing Event Total Cost Formulas [page 211]
Adding Team Members to Event Project Groups [page 47]
Inviting Existing Suppliers to Events [page 57]

Creating Event Total Cost Content

Use this procedure to create event total cost content.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

The following procedure describes how to create cost components for bottles, switching costs, and inventory costs. Creating separate cost components allows cost components to be identified separately in each bid and compared across different supplier bids.

Procedure

1. When you are done inviting participants to an event,, the **Content** page appears. Alternatively, you can open the **Content** page by clicking the **Content** step in the left pane.

2. Check the box to the left of **Pricing**.
3. Click **Add** and select **Line Item**.
4. Enter a name for line item.
5. Specify a **Ceiling/Initial** price and the same **Historic** price.
6. Set the **Quantity**.
7. Set the decrement and bid buffers.
8. Click **Add** and select **Term**.
9. Enter a name for the term. The following fields are of special interest:
    - **Include in Cost**: This amount is going to be included in the total-cost formula by adding it to the price.
    - **Apply to cost for**: This specifies that this adder is added to the cost of each unit.
    - **Response Required**: **Yes**, a response is required from the participant so specify how much this charge is.
    - **Initial value**: An initial value is the floor for forward auctions and the ceiling for reverse auctions.
10. Click **Done**.
11. Click **Add** and select **Term**.
12. Name a name for the term. The following fields are of special interest:
    - **Include in Cost**: This amount is going to be included in the total-cost formula by adding it to the price.
    - **Apply to cost for**: This specifies that this adder is added to the cost of the entire order. This changes where the term appears in the final formula.
    - **Response Required**: No response is required from the participant. As the project owner you get an opportunity to specify what the value for this is for each supplier.
    - **Visible to Participant**: In this case the answer is no. The participant cannot set this value and you might not even want them to know you are adding it to the total cost.
    - **Use participant-specific initial values**: Yes. This value must be allowed to be different for each supplier. For the incumbent supplier this value will be zero. If you switch to a new supplier the cost of switching might vary depending on the suppliers location, differences in their bottle design, or any number of other factors.
    - **Initial value**: An initial value is the floor for forward auctions and the ceiling for reverse auctions.
13. Click **OK**.

Next Steps

You are now ready to configure the total cost auction content.

Related Information

Setting Up Total Cost Auctions or RFPs [page 207]
Creating Total Cost Auctions or RFPs [page 207]
Seeing Event Total Cost Formulas [page 211]

Seeing Event Total Cost Formulas

This procedure describes how to see event total cost forumals.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Procedure

1. From the *Content* list, click the line item for which you added a total cost formula and click **Edit**.
2. Click the **Fx** formula link to the right of the **Total Cost** value.

   The formula that you have created appears.
3. Close the formula box and scroll down.
4. Check the value for the switching costs for the suppliers. The switching cost for the incumbent are zero.
5. Click **Done** and then click **Next**.

Next Steps

If necessary, you can add complexity to your formulas by using functions.

Related Information

[Setting Up Total Cost Auctions or RFPs [page 207]](#)
Creating Total Cost Auctions or RFPs [page 207]
Creating Event Total Cost Content [page 209]
Using Functions [page 145]

Event Index Auctions

In an index auction, suppliers bid in discounts or premiums relative to a market index. Typical index prices follow this format: price/unit of measurement. For example, $6000/Metric Ton or $300/Thousand Board Feet.

About Event Index Auctions [page 212]

Creating Index Auctions [page 217]

About Event Index Auctions

Index auctions are useful in the following cases:

- You are sourcing a commodity that is subject to frequent price fluctuations, such as commodity oil, metals, and temp labor.
- You want to compare prices to a baseline.

Amount or Percentage Bidding

This is the format that suppliers use to place their bids. You choose whether to create an **Index Based Auction by Amount** or an **Index Based Auction by Percentage** when you choose the event template during event creation.

Amount

You can choose to have suppliers place bids in terms of a nominal (currency) amount above or below the index. For example, $5 above the index value. If the index value is $50, the bid is $55.

Percentage

You can choose to have suppliers place bids in terms of a percentage value either above or below an index. For example, 5% less than the index value. If the index value is $50, the bid is $47.50.

Discount or Premium Bidding

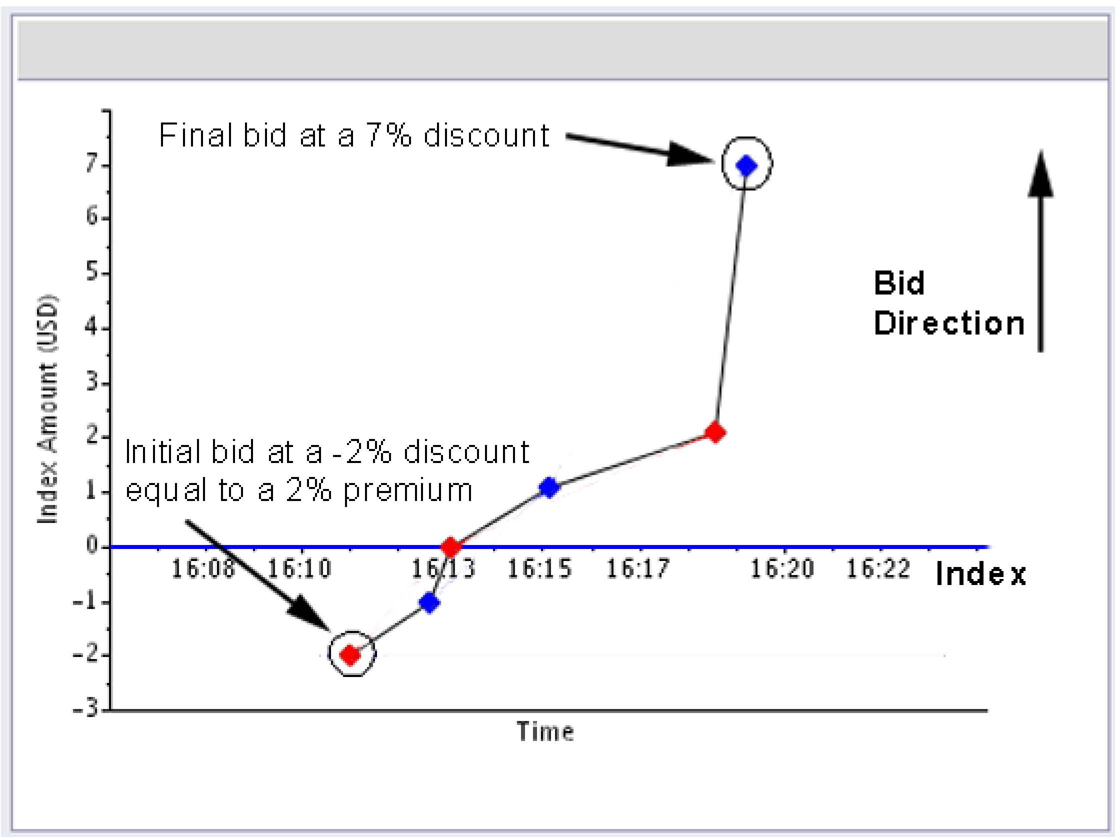
When setting up line items or lots in an index auction, you decide whether to use discount or premium bidding. Within the same event you can have a line item set up for discount bidding and a line item set up for premium bidding.

Discount Bidding

In discount bidding, suppliers compete to offer you the highest discount off of a standard fluctuating market index.

For example, you are purchasing diesel fuel and, due to a fuel surplus, and you anticipate that the price of fuel is going to decrease. Discount bidding is the most appropriate for the current market conditions.

The following bid graph is an example of this type of market. Notice how the bids increase from the starting value of $ -2 (a negative discount, also known as a premium) to the final value of $7. In this type of bidding, higher bid amounts equate to more savings. Take note that the bidding direction is upward and relative to the identified index.

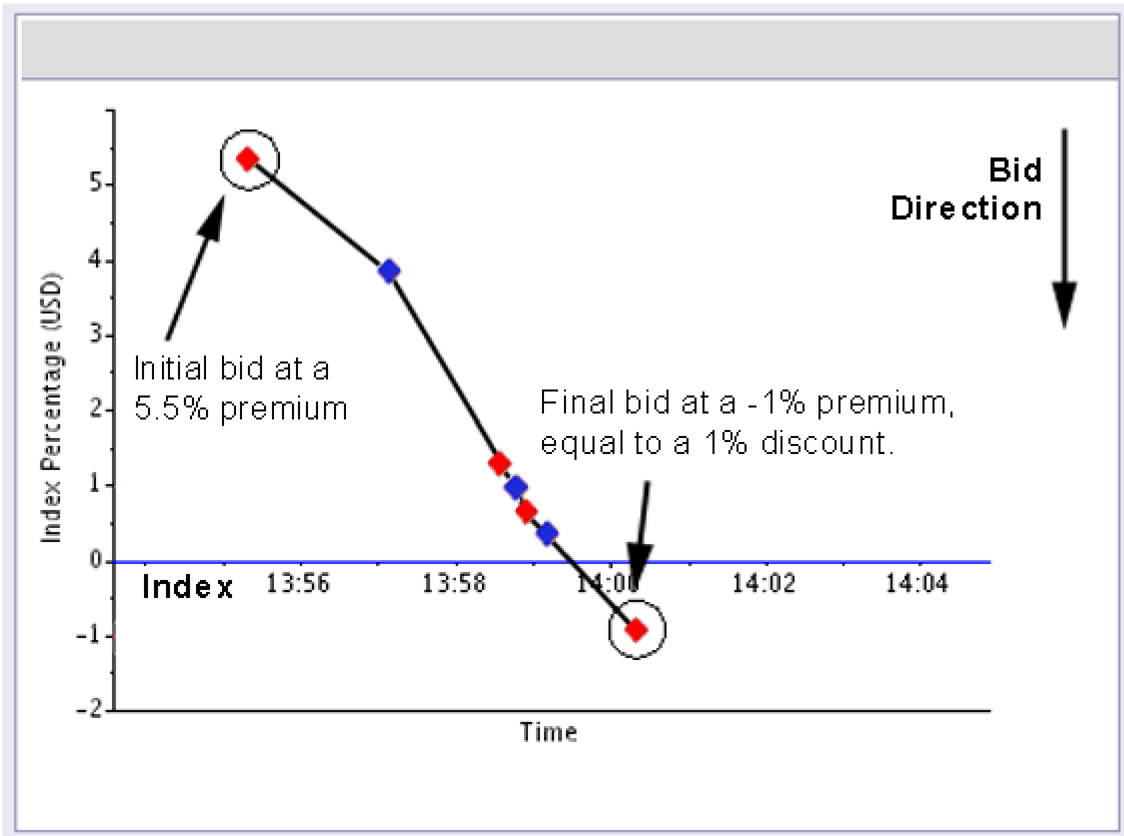


Premium Bidding

In premium bidding, suppliers compete to offer you the lowest premium added to a standard fluctuating market index.

For example, you are purchasing natural gas and due to rising demand you anticipate that suppliers might submit bids above the current index price. Premium bidding is the most appropriate for current market conditions.

The following bid graph is an example of this type of market. The bids start at a 5.5% premium above the index value and then decrease as suppliers lower the premium charges added onto the index. The final bid is for -1% (a negative premium, also known as a discount). In this type of bidding, lower bid amounts equal higher savings. Take note that the bidding direction is downward, similar to a reverse auction format.



Index Auction Strategy

Index bidding is appropriate when:

- You have previously evaluated supplier bids against an index.
- Price fluctuates significantly within your contract period.
- The commodity is already tracked on a published index.
- You want to evaluate bids against a baseline number that you define.

Evaluating Bids Against a Standard Index

A standard index helps you account for frequent price fluctuations. You use index bidding for standardized commodities that have established price indices:

- Raw materials
- Electricity
- Natural Gas
- Ferroalloys
- Raw Steel
- Diesel Fuel
- Food Products
- Jet Fuel
- Lumber
- Chemicals

Example:

You are a buyer responsible for purchasing lumber. Due to fluctuations in the price of lumber, it is difficult to negotiate a specific price with your suppliers. One week, the lumber might cost $500 / Thousand board feet, and the next week it might cost $650 / Thousand board feet.

In order to account for these fluctuations and still have a competitive online market, you decide to use index bidding. Your strategy is to use premium bidding format and base it off of the index value found in the Hardwood Market Report.

Example:

You are sourcing rental car services among five different rental companies. You create an auction using Discount bidding format. This allows you to define what you want the starting per day rate to be (the index) and then have suppliers bid a percentage discount off of this rate.

In this type of auction, you can evaluate suppliers by the percent discount that they give you. For example, one supplier might give you a 7% discount off what you are currently paying and another supplier might give you an 11% discount.

Deciding Which Index to Use

Deciding which index to use is one of the most important decisions you have to make when preparing for an index auction.

Ariba recommends you consider the following:

- Supplier Acceptance: Choose an index that is acceptable to all your suppliers.
- Index Volatility: Choose an index not subject to large price fluctuations.
- Index Value: Be specific—indices are constantly in flux.
  For example, a fuel index may indicate the low price per gallon of diesel fuel is $1.00, the average price is $1.50, and the high price is $2.00. Also, indices typically change value over the course of the day. Finally, some indices have national and regional values. When you create an index auction, define whether to use the low, average, or high prices, at what time of day, and in what region.

Frequently Asked Questions About Preparing for an Index Auction

Will Suppliers Agree to Use the Index You Choose?

Work to ensure that all participating suppliers understand the index you select. Discuss the index format with them in advance and make sure they understand your requirements and methodology.

How Do I Communicate the Auction Information to All My Suppliers?

Convey information about the index and the auction format you plan to use in your requirements as well as in any other communication that you have with your suppliers.

What Additional Information Do I Need to Convey to My Suppliers if I Am Running an Index Auction?

Convey what index you will be using and how the suppliers will be expected to bid when the market opens. Detail how the final pricing for your market will be determined.

Most buyers determine final pricing by taking:

```
Final Price = Fixed Costs + Index Value on Ship Date +/- Supplier Premium or Discount
```

If you are evaluating bids against an index that has significant fluctuations, you might decide to determine final pricing by using the average index value instead of the value on the ship date. If this is the case, you will want to make sure suppliers understand in advance how this value will be calculated.

Creating Index Auctions

Use this procedure to create index auctions.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

In an index auction, suppliers bid in discounts or premiums relative to a market index. Typical index prices follow this format: price/unit of measurement. Discounts or premium formats are defined at the line item level. You can have line items of both formats within the same event.

Procedure

1. On the dashboard, click **Create** > **Sourcing Project**.
2. Choose **Event Type** > **Auction**. The list of templates at the bottom of the page refreshes.
3. Choose the template **Index Based Auction by Amount** or **Index Based Auction by Percentage**.
4. Click **Create**.
5. On the **Rules** page, set the rule **Improve bid amount by** to either **Percentage** or **Nominal Amount**.

> **Note**
> You cannot set this value for **Index Based Auction by Percentage**. It is automatically set to **Nominal Amount**.

6. Add or edit a line item.
7. Edit the item term **Index Amount** or **Index Percentage** within the line item.
8. Set the rule **Will participants compete on this term?** to either **Yes, Downward bidding** for a premium format auction, or to **Yes, Upward bidding**, for a discount format auction.

Related Information

About Event Index Auctions [page 212]
Index Auction Strategy [page 214]

Creating Dutch Auctions

Use this procedure to create a Dutch auction. Dutch auctions are best suited for events in which cost is the primary concern. You use this type of event when suppliers are prequalified and when there are few suppliers. A Dutch auction pressures participants to bid the best price they possibly can and to bid before their competitors can take the business away.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

In a reverse Dutch auction, you are buying and the price automatically rises at configured intervals; in a forward Dutch auction, you are selling and the price automatically drops. Prices are automatically adjusted until one of the participants accepts the price or the configured time expires. Participants are under pressure to bid as soon as they can, which favors the event owner. If the Dutch auction allows partial-quantity bidding, there may be other opportunities to do business with the unsold quantity.

Set the starting price for Dutch auctions as follows:

- In a reverse Dutch auction, set the starting price just below the absolute lowest price for which you anticipate the seller is willing to sell it.
- In a forward Dutch auction, set the starting price just above the absolute highest price for which you anticipate the buyer is willing to buy it.

Reverse Dutch auctions are best suited for events in which cost is the primary concern. You use this type of event when suppliers are prequalified and when there are few suppliers. A reverse Dutch auction pressures participants to bid the best price they possibly can and to bid before their competitors can take the business away.

A Dutch auction has the following special characteristics:

- Participants cannot submit bids during the preview period. If the **Can Participants Place Bids During Preview Period** event rule is set to allow bids during the preview period, participants cannot submit bids during the preview period but can submit answers to event questions.
- Forces lots to use serial bidding. One lot is open for bidding. When it closes, the next one opens.
- Disables the overtime option. It is not needed.
- Disables the ability to import responses using Microsoft Excel.
- The page is refreshed every five seconds. (For other events it is 20 seconds).

> ⓘ Note
>
> SAP Ariba provides templates for creating Dutch auctions with bid transformation. When using bid transformation with Dutch auctions:
>
> - Items with a bid adjustment interval set to **Percentage** and an adder or subtracter cost term, can cause the bid value you see to differ from the bid value displayed to participants. A warning message is displayed if you attempt to publish an auction with these settings.
> - SAP Ariba recommends that you do not set a range for price and extended price terms in a Dutch auction with bid transformation. The price and extended price terms will be different for each participant, depending on the transformation factors.

Procedure

1. On the dashboard, click **Create** > **Sourcing Project**.
2. For the event type, choose **Auction**, if buying or **Forward Auction**, if you are selling.
3. From the list of event templates, choose the **Dutch Reverse Auction** or **Dutch Reverse Auction with Bid Transformation** templates, if you are buying or the **Dutch Forward Auction** or **Dutch Forward Auction with Bid Transformation** templates if you are selling.

4. Click **Create**.
5. Add team members [page 45].
6. Set event rules. Click **Rules** on the left side of the **Event** page.

> ⓘ Note
>
> An event rule might not be visible or editable in events, depending on how the rule is configured by the template author. For more information about event rules, see Event Rules Reference Guide.

The event rules for Dutch auctions are:

- Event **Timing Rules**
    - **Can Participants Place Bids During Preview Period**
      In a Dutch auction, "bids" during during the preview period means responses to questions. Actual bids on lots and items are not allowed during the preview period in a Dutch auction. In general, a Dutch auction is better when participants are prequalified, but if you have questions you want to ask before the bidding starts, allow or require "prebids."
    - **Running time for the first lot**
      Bidding for lots/items is serial and is the time during which the first lot is open for bidding. You can specify minutes, hours or days.
      Default value: 10 minutes.
    - **Time between lot closing**
      The running, or bidding, time for all lots other than the first lot. You can specify minutes, hours or days.
      Default value: 10 minutes.
    - **Bid adjustment interval**
      The intervals at which the price automatically changes. Whether it changes by an amount or percentage depends on how you set the event bidding rule **Adjust bid amount by**. How much or by what percentage is set in the item bidding rules when you create each lot or line item. Set an interval that allows enough time for bidding. It favors you when participants bid in this interval instead of the next one, so give them time to consider whether they submit a bid. The lowest possible value is 30 seconds.
      Default value: 30 seconds (for reverse auctions, the price increases every 30 seconds; for forward auctions, the price decreases every 30 seconds).
- Event **Bidding Rules**
    - **Adjust bid amount by**
      Specifies if the price is adjusted by a fixed amount (**Nominal amount**) or by a percentage of the current price (**Percentage**) for each round. Event owners configure the adjustment values in the bidding rules for each item.
      Default value: **Nominal amount**.
- Event **Market Feedback** rules
    - **Show ceiling price to all participants**
      Show the target price (highest price for reverse auctions or lowest price for forward auctions) to all participants.

      > → Tip
      >
      > In most cases, you want to set this rule to **No** so participants can't see your target price.

      Default value: **Yes**.
    - **Hide countdown clock from participants**

The countdown clock indicates when the bidding time ends for a lot or item. During bidding, participants can observe the price adjustment values and intervals; if the countdown clock is visible, participants can use this information with the countdown clock to determine price boundaries.
When set to **Yes**, the countdown clock is not shown to participants.
Default value: **No**.

7. Invite participants. Click **Suppliers** (or **Participants**, if you are creating a forward auction) on the left side of the **Event** page. Click **Invite Participants** and search for participants.

   See Inviting Event Participants [page 52] for more information.
8. Add items, set item terms, and set item **Bidding Rules**. Click **Content** on the left side of the **Event** page.

   For a Dutch auction, set the initial price at or slightly below the lowest price at which you think suppliers will sell (the price will increase each round). For a Dutch forward auction, set the initial price to the lowest price at which you are willing to sell.

   The item **Bidding Rules** for Dutch auctions are:

   - **Bid adjustment**
     The amount by which the price changes for each round.
   - **Range**
     Price range (lower and upper value). For Dutch reverse auctions, the target price is the upper value in the range; set the upper value to the highest price you are willing to pay. Bidding ends for the item item in a Dutch reverse auction when the price level is greater than or equal to the upper value (or the running time ends).
     For Dutch forward auctions, the target price is the lower value; set the lower value to the lowest price at which you are willing to sell. In a Dutch forward auction, bidding ends for the item when the price level is less than or equal to the lower value (or the running time ends).
     The initial price for the item must be within the lower and upper range values, inclusive.

     > Note
     >
     > In a reverse auction where price levels are adjusted by a percentage of the current price (**Adjust bid amount by** is **Percentage**), set the initial price to be greater than 0; if you set the initial price to 0, the price level won't change.

   You can optionally configure **partial-quantity bidding**. With partial-quantity bidding, participants can specify how much or how many of an item they want to buy or sell at the specified price.
9. **Optional:** Configure **partial-quantity bidding**.

   Partial-quantity bidding enables participants to specify how much or how many of an item they want to buy or sell at the specified price. You can only set up partial-quantity bidding for line items, but not lots, and not line items in lots.

   a. Create a line item [page 92] or open an existing line item for editing.Partial-quantity bidding enables participants to specify how much or how many of an item they want to buy or sell at the specified price. You can only set up partial-quantity bidding for line items, but not lots, and not line items in lots.
   b. In the fields above the line item terms, select **Participants bid per unit (unit bidding)** to set the line item for unit bidding.
   c. Right-click the **Quantity** term and select **Edit**.
   d. For **Response Required?**, select **Yes, Participant Required**.
   e. For **Acceptable Values,** you can select **Limited Range**. When you select **Limited Range**, the **Range** option appears in which you can specify a range of quantities that participants may specify. You use this to set minimum and/or maximum quantities.

10. Configure any remaining items for the auction and publish the auction.

Next Steps

Monitor the auction. Consider the following if you decide to edit a Dutch auction:

- Changing quantities:
  If you change the quantity of a lot or line, the system automatically adjusts the remaining quantity shown to participants. Be careful when changing the quantity for two reasons:
  - If you specified a minimum bidding quantity, be careful that your change cannot result in a leftover quantity smaller than this minimum, otherwise participants cannot bid on it.
  - There is some time lag in the system. If you reduce the quantity at the same time that a participant is bidding on the remaining quantity, the bid and the change may not show up until after the next refresh, resulting in a negative quantity. To fix it, you must delete the last bid and reopen the lot/line.
- Changing prices:
  If you opened the lot/line at the wrong price and need to change it after a participant has already bid, you may have to delete their bid. For example, in a reverse Dutch auction, suppose you start the bidding for a lot at $500, then realize that you meant to start it at $50. If a supplier has already taken the lot at $500 you must change the price, delete their bid, and reopen the lot.

RFPs with Price Breakdown

An RFP with Price Breakdown template allows you to create RFPs that collect a breakdown of the supplier's price.

About RFPs with Price Breakdown [page 222]

Creating RFPs with Price Breakdown [page 223]

About RFPs with Price Breakdown

The **Request for Proposal with Price Breakdown** template allows you to create RFPs that collect a breakdown of the supplier's price instead of soliciting total prices. The additional information helps you to:

- Learn more about your suppliers' businesses.
- Compare suppliers' prices more critically.
- Decide if the supplier's price is reasonable.

Suppose that a supplier sells you a part for $.05 a unit. You want to understand how the supplier arrived at that price. You learn that for this particular part there are four primary costs: tooling, labor, materials, and markup. Therefore you want your suppliers to quote you on each one of those costs for that particular part.

In a standard RFP, suppliers are prompted to enter their price for a line item. When creating an **RFP with price breakdown** event, you define fields (terms) for suppliers to fill out to provide you with the elements of their price to you.

An **RFP with price breakdown** and a **total cost** event are different. For an **RFP with price breakdown**, suppliers do not specify a *Price* for an item. Instead, suppliers specify values for price components and the item *Price* is calculated by adding the price components. Price components are all terms that you define as adders or subtracters applied per unit.

For a **total cost** event, suppliers specify a *Price* for an item and additional cost components. Cost components are terms that you define as adders, subtracters, multipliers, and dividers, applied per unit or applied to all units collectively. **Total Cost** calculations are based on the *Price*, the **Quantity** and cost components; they can be more complex than those available using only the price breakdown method.

Note that you can use cost components in an **RFP with price breakdown** event. Terms that you define as adders or subtracters on a per-unit basis are used to determine the **Price**. The **Total Cost** is then calculated using the **Price**, the **Quantity** and the remaining adders, subtracters, multipliers, and dividers.

Creating RFPs with Price Breakdown

Use this procedure to create RFPs with price breakdown.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

The first step in creating an **RFP with Price Breakdown** is to create an event using the **RFP with Price Breakdown** template. The only additional difference when you create an **RFP with Price Breakdown** is how you create line items:

- In a standard **RFP** or **Auction**, you use line items to collect the pricing for complete items.
- In an **RFP with Price Breakdown**, you add terms to line items to collect the costs that make up a line item. Those costs are also called price breakdown information.

Procedure

1. On the **Content** page, choose **Add** > **Line Item**.
2. Fill out basic line item information such as **Name**, **Quantity**.
3. In the **Item Terms** area, choose **Add** > **Term**.
4. Click the **New Term** tab.
5. Enter the name of the price breakdown term. For example, **Tooling**.
6. Change the **Include in Cost** option to **Adder**.
7. Modify the other fields on the page as needed.
8. Click **OK**. Repeat steps 3–8 to add all of the terms.
9. If you click **Done** to exit the **Add Item** page at this point, you receive an error: **You must provide a Historical Value for Item 1, 'Total Cost'.** There are two ways to resolve this error:
   - Enter an historic value for the **Total Cost**.
     Click the name **Total Cost** and choose **Edit**.
     Change the field **Formula** computation to **Compute for bidders**. Click **OK**.
     In the **Item Terms** area, the term **Total Cost** now has fields where you can enter historic and reserve values. In the **Historic** field, enter a figure representing the price that you paid for the line item in the past. Leave the other fields blank.
   - You can also enter historic values for each cost term.
     To do this, edit each cost term individually and set the field **Has historic value** to equal either **Yes** or **Yes and required**.
     When you have done this, you will see that each cost term now has a field where you can enter its historic value. Fill in those values, and refresh the page somehow; clicking **Done** and then reediting the line item is one way to do this.
10. Click **Done** to exit the **Add Item** page.

Results

You see the Line Item created on the **Content** page.

Next Steps

Validate that the content will appear as you intend to suppliers is to use the **View as Participant** feature. Choose **Actions** > **View as Participant** > (supplier name). Enter values for the cost breakdown terms and click **Update Totals** to see how they add together into the total price.

Related Information

About RFPs with Price Breakdown [page 222]

Alternative Bidding

Alternative bidding lets participants submit alternate bids after they have submitted a primary bid.

About Alternative Bidding

Alternative bidding gives participants the ability to submit alternate bids after they have submitted a primary bid based on the event as you defined it. You can then optimize across all of the bids you receive, both primary and alternative. This allows you to not only collect the pricing you want, but also allows participants to submit a response in such a way that they feel is best. For example, you may be certain you want to collect pricing based on a one year warranty. However, participants may want to stand out by offering two or three year warranties at a similar price. By enabling alternative bidding, you allow participants to provide this information after they have submitted their primary bid.

Alternative bidding can also be useful if you want to collect pricing for a particular volume, but your confidence in that forecast volume is not very high. Using alternative bidding allows you to collect volume tier pricing, providing you with pricing at different volume levels in case you need to award a larger or smaller quantity than originally expected.

The following types of alternative bids are supported:

- **Supplier Bundles** - Allows participants to submit discounted pricing based on bundles of items they create.
- **Volume Tiers** - Allows participants to create volume tier structures with pricing at each of the volume tier levels. You want to find the best pricing based on the forecast of quantity you are looking for. However, the reality is that your forecast can sometimes be off significantly. By collecting volume tiers from participants, you

will have a range of quantities to award at with submitted prices, so you do not have to re-negotiate a price at the new quantity.

- **Alternative Pricing** - Allows participants to submit different values for the terms included in an item and adjust their price accordingly. Participant offerings do not always align with what you are looking for. Alternative pricing allows participants to respond to what you are looking for and also provide alternative responses. You can then view the primary and alternative pricing responses and decide what meets your needs the best. When support for pricing conditions in alternative bids is enabled, suppliers can create alternative bids with different prices for each term that is configured as a pricing condition. If buyers have enabled supplier defined validity periods and allowed supplier scales, suppliers can change validity periods and quantity scales in alternative bids.

Typically, a template author creates templates with alternative bidding rules configured for event creators, as described in Configuring Event Templates for Alternative Bidding [page 499].

About Monitoring Alternative Bids

The **Content** tab in the event monitoring interface displays each participant's primary and alternative bids in columns. Primary bids display in the column named after the participant, for example, Big Box Retail. Alternative Bids display in the columns named after the participant and their alternative bid name, for example, Big Box Retail - Bundle Bid.

If different bundle alternatives have the same structure, such as the same line items in the bundle, then they display side by side. Tiers display in a similar way to bundles, if different tier alternatives have the same structure, such as the same line items in the tier and same tier quantity structure, then they also display side by side.

You can control which alternative bids will display in the **Content** tab. You can hide all alternative bids or choose from a list to display only the ones you want to review.

Envelope Bidding with Alternative Bids for Lots and Service Items

In events with envelope bidding, participants' alternative responses for lots and service items are visible when the buyer opens the envelope.

Buyers can view participants' alternative bids for lots and service items in the context of an envelope. Envelope bidding allows control over who can see participant responses and when the responses can be seen. Alternative responses allow participants to submit a response that is different from the response defined by the event owner, but that works well for the participant. An alternative response is in addition to the participant's primary response.

Service items can be part of a service hierarchy, which can include outlines and specifications.

Prerequisites

- **Roll up term values in alternative bids** (`Application.AQS.RFX.RollupAlternativeAttributeValue`) must be set to **Yes**.

Your administrator can set this parameter in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.

- To enable service items and service item hierarchies, you must enable all of the following toggles:
  - **UP-4293**
  - **UP-5387**
  - **UP-7455**
  - **UP-18784**

  You must also set the parameter **Application.ACM.ComplexServiceHierarchy.Enabled** to **Yes**.
  Have your designated support contact file a service request (SR) to enable these items.

See also Event Envelope Rules.

Related Information

Alternative Bidding [page 225]
Building Envelopes [page 135]
Event Service Items and Service Hierarchies [page 116]
Types of Lots [page 86]

Using Separate Envelopes for Primary and Alternative Bids

Buyers can create separate envelopes to contain the primary and alternative bids, enabling the team members to evaluate the responses separately.

Buyers can create sourcing events with technical and commercial envelopes to ensure the participants responses are not visible until the envelopes are opened by authorized team members. The technical envelope is opened by authorized team members and responses are evaluated. The selected participants advance to the commercial envelope, which can be opened by commercial team members to evaluate the supplier bids and create awards. When the commercial envelope is opened, all the primary and alternative bids for the selected suppliers are revealed. Buyers can open the primary and alternative bids individually for better evaluation of supplier responses.

- You must set the rule **Separate envelopes for primary and alternative bids** to **Yes** in the event template to ensure that separate envelopes are created in the sourcing event.
- In the **Open Envelope Confirmation** page, you can view both the primary and alternatives responses from the suppliers. You can choose to open either or both responses based on your requirement.
- In the **Unseal Next Envelope** page you can view both primary and alternative bids from suppliers. You can choose to open either or both responses based on your requirement.
- When evaluating a technical envelope, you must choose the primary bid, but you can choose not to select the alternative bid response. There is an error message displayed when you do not choose the primary bid response for a supplier.

> ⓘ Note
>
> When opening a commercial envelope, a warning message is displayed when you do not choose the primary response for the supplier, but choose the alternative bid response. You can proceed to opening and evaluating the responses contaned in the envelopes.

Including Alternative Bids in Bid Ranking

Buyers can include alternative bids (bids that include alternative pricing) together with primary (standard) bids in bid ranking, making it easier to compare bids when an event includes alternative bids.

An event bidding rule, **Include alternative pricing bids when bids are ranked**, controls whether to include alternative bids when bids are ranked (for example, in the Item Rank Report). The default for this event rule is **No**.

A supplier's primary bid can differ from the same supplier's alternative bid only because values for terms (for example, delivery terms) are different. In cases like this, the buyer makes a subjective call after analyzing the rankings.

If the rule **Include alternative pricing bids when bids are ranked** is set to **Yes**, alternative bids are ranked together with regular bids in these places:

- On these event tabs: **Content**, **Scenario**, and **Report**
- On the **Consensus Grading** page
- In the event **Bid Graph** on the **Bid Console** tab
- In downloaded files on the event **Report** and **Award** tabs

> ⚠ Restriction
>
> - This feature doesn't support bundles or volume tier pricing.
> - This feature isn't available for events in which participants see the lead bid, their rank, or other participants' ranks.
> - This feature isn't supported with events that allow tie bids.
> - This feature isn't available in analytical reports.
>
> See Creating Events with Alternative Bidding [page 229] or Configuring Event Templates for Alternative Bidding [page 499] for the rule settings required to make the **Include alternative pricing bids when bids are ranked** rule available.

Using Optimization Scenarios with Alternative Bids

You can use alternative bid data in optimization scenarios. The optimization scenario allows you to analyze the award decision for a large or complex event. The optimization helps you make the award decision by allowing you to create and compare hypothetical awarding models with specific constraints to determine the potential awarding results. You do not have to accept any of the scenarios. When you are done with your analysis, you can accept the award scenario or scenarios that makes sense to you.

You can select which alternative bid types are included in the optimization scenario:

- Allow Alternative Pricing
- Allow Participant Bundle
- Allow Tier

You can then add constraints to specify, both primary and alternative bids, to include in your optimization scenario.

Related Information

Awarding Events Using Event Optimization Scenarios [page 333]

Using Manual Scenarios with Alternative Bids

You can also use alternative bid data in manual scenarios. The manual scenario allows you to award specific lots to individual suppliers, and split the awarding of a lot by percentage among multiple suppliers. This scenario is useful if your awarding decision is fairly obvious. For large and complex events where the awarding is not easy to determine, use an optimization scenario.

In the pull-down menu for each item or lot, you can select the participant to whom you are awarding the item. If you want to award an alternative bid, select **Advanced Award**. You can use the Split Award window to specify the percentage for each participant or alternative bid.

Related Information

Awarding Events Using Event Optimization Scenarios [page 333]

Grading Alternative Bids

Team members can have differing opinions about what information is important as well as the quality of a supplier's alternative responses. Team grading allows multiple team members to grade supplier alternative responses to an RFI or RFP event. A project owner can get information about team member's opinions by having them grade supplier alternative responses to event content. An average is generated from these grades, and, if required, the team members can come together to come up with a consensus grade for each supplier answer particularly when there is disagreement on how to score specific participants and their alternative responses.

Creating Events with Alternative Bidding

Use this procedure to create events with alternative bidding.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Alternative bidding allows participants to submit alternate bids after they've submitted a primary bid that was based on the event as you defined it.

Typically, a template author creates templates with alternative bidding rules configured for event creators, as described in Configuring Event Templates for Alternative Bidding [page 499].

By default, alternative bidding only works with items. Alternative bidding for lots is not supported. You can, however, allow suppliers to add items and lots in alternative bids. Suppliers can then bid on the items and lots that they added. For more information, see Supplier-Added Items in Events [page 253].

The event rules you can set and view depends on how rules are delegated in the template used to create your event.

Procedure

1. Create a sourcing event project in which you want to allow participants to submit alternative bids.
2. If the **Specify how lot bidding will begin and end** dropdown is available, choose **Parallel**. Alternative bidding only works with parallel bidding.
3. If the **Can participants create alternative responses** option is available in the **Bidding Rules** section on the **Rules** page, set it to **Yes**.

   The event rules you can set and view depends on how rules are delegated in the template used to create your event.

   The following alternative bidding rules can appear after you choose **Yes** for **Can participants create alternative responses?**:

   - **Can participants create alternative pricing?**: Set this to **Yes** to allow participants to specify alternative pricing values in alternative responses.
     If you want to enable pricing conditions-based alternative pricing, set the **Allow pricing conditions** rule to **Yes** and the **Can edit pricing condition terms in alternatives** rule, which appears when the **Allow pricing**

conditions rule to **Yes**, to **Yes**. For more information, see Enabling Pricing Conditions-Based Alternative Bids in the Classic UI of SAP Ariba Sourcing [page 235].
- **Can participants create bundles?**: Set this to **Yes** to allow participants to create bundles and add line items to the bundles in alternative responses.
- **Can participants create tiers?**: Set this to **Yes** to allow participants to create volume tiers in alternative responses.

If you have the SAP Ariba Strategic Sourcing Suite, you may also see the following rules:
- **Should questions be visible in alternatives?**: Set this to **Yes** to allow questions to be visible to suppliers when adding alternative responses.
- **Should there be a limit on number of alternatives?**: Set this to **Yes** to enforce a limit to the number of alternative responses that a supplier can provide. Enter the limit maximum value in the **Alternative limit value** field.
- **Allow supplier to add items**: Set this to **Yes** to allow suppliers to add items.

> ⓘ Note
>
> If **Allow supplier to add items** is set to **Yes**, the **Maximum supplier-added items for each supplier** and **Allow supplier-added items only in alternative bids** rules become visible.

For more information about alternative bidding rules, see Event Rules Reference Guide.

4. Select **Content** in the left menu panel to add lots and line items to the event.
5. Select **Add** > **Line Item** > **Add** to add an item for which you want participants to submit both primary and alternative bids.
6. If the item definition in the template for your event does not include terms that participants (suppliers) can modify in alternative bids, add an item term.

   If the template for your event is configured for alternative pricing (**Can participants create alternative pricing?** is set to **Yes**), the item definition in the template typically includes a **Price** term that participants can edit (modify) in alternative bids.

   A user with **Template Creator** capabilities can view the template to verify which terms can be edited by participants.

   a. In the **Item Terms** area of the **Add Item** page, select **Add** > **Term** .

      The **Add Terms** page opens.

   b. Select the **New Term** tab.

   c. In the **Is term editable in alternatives?** field, choose **Editable By Owner and Participant**.

      The **Is term editable in alternatives?** field is visible only after you choose **Yes** for **Can participants create alternative responses?** in the Bidding Rules section, and this field might not be visible or editable in events, depending on how the term is configured by the template author.

      After you choose **Editable By Owner and Participant** the **Can participant edit term's primary response?** field appears. Choose **Yes**.

      > ⓘ Note
      >
      > You can view the **Quantity** term in the supplier column of the bid comparison report only when **Can participant edit term's primary response?** is set to **Yes** and **Is term editable in alternatives** is set to **Editable by Owner and Participant**.

> When `Application.AQS.RFX.EnableIsTermEditableInAlternativesToEditableByOwnerAndParticipant` parameter is enabled, the default value for **Is term editable in alternatives** is set to **Editable by Owner and Participant** and suppliers can edit the questions added at the event level in the alternative responses. Contact SAP Ariba Support to enable this parameter.

Participants can edit the term in their alternative responses and in their primary responses.

7. **Optional:** Configure the event to include alternative bids in bid rankings.

   You can make it easier to compare alternative bids against primary (standard) bids by setting the event rule **Include alternative pricing bids when bids are ranked** to **Yes**.

   To set **Include alternative pricing bids when bids are ranked** to **Yes**, event rules must be configured as follows:

   - The following event bidding rules must be set to **Yes**:
     - **Can participants create alternative responses**
     - **Can participants create alternative pricing**
   - The following event bidding rules must be set to **No**:
     - **Allow Bidding Overtime**
     - **Enable Traffic Light Bidding**
   - The event bidding rule **Can participants submit tie bids** must be set to one of the following values:
     - **Break tie bids by submit time**
     - **Allow tie bids for all ranks**
   - If **Must participants improve their bids** is set to **Yes**, the following market feedback rules must be set to **No**:
     - **Show lead bid to all participants**
     - **Can participants see ranks**

   For more information about including alternative bids in bid ranking, refer to Including Alternative Bids in Bid Ranking [page 228].

Results

Participants can edit the term in their alternative responses and in their primary responses.

If a maximum number of alternative responses allowed is configured and a participant tries to add an alternative response beyond the limit, the participant sees a message indicating that the number of responses is at the maximum number. The participant can delete an existing alternative response and replace it with another one.

Buyers can see primary and alternative responses submitted by participants under the **Contents** tab in the **All Content** table.

Related Information

About Alternative Bidding [page 225]

Hiding Alternative Bids in the Event Monitoring Interface [page 233]
Deleting Alternative Bids [page 234]

Hiding Alternative Bids in the Event Monitoring Interface

Use this procedure to hide alternative bids in the event monitoring interface.

Prerequisites

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)

Context

You can control which alternative bids will display in the **Content** tab of an event. You can hide all alternative bids or choose from a list to display only the ones you want to review.

Procedure

1. Open the **Content** tab of an event that's open for bidding or in the pending selection state.
2. Click the **Table Options** menu.
3. Click **Select / Filter** > **Participants**. The Select Values for Participants dialog box is displayed.

   A selected check box indicates that the corresponding participant primary or alternative bid displays on the **Content** tab.
4. Choose **Hide Alternative Responses** to hide the alternative bids on the **Content** tab. You can also select and deselect individual participant bids to configure what displays on the **Content** tab.

5. Click **OK**.

Related Information

[About Alternative Bidding [page 225]](#)
[Creating Events with Alternative Bidding [page 229]](#)
[Deleting Alternative Bids [page 234]](#)

Deleting Alternative Bids

Use this procedure to delete alternative bids.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Similar to deleting a line item from a participant's response, you can delete a participant's alternative bid from their response.

If you have permission, you can delete alternative bids. Suppose, that one of the participants in an auction is confused, and submits an alternative bid that is drastically higher or lower than the competitive prices. This can also happen if they inadvertently leave out (or add) zeros. Even though the bid is not reasonable, the system might define it as the leading bid. In this case, you can delete erroneous alternative bids in order to allow the auction to progress.

Procedure

1. On the **Bid Console** tab of the monitoring interface, find the bid you want to delete in the **Bid History** table.
2. Click the alternative bid and choose **Delete Alternative Bid**.

Results

The alternative bid is removed from the bid history table. In the bid graph, its color changes to black, indicating that it has been removed from the auction. The participant receives a notification informing them that you deleted their alternative bid.

Related Information

About Alternative Bidding [page 225]
Creating Events with Alternative Bidding [page 229]
Hiding Alternative Bids in the Event Monitoring Interface [page 233]

Enabling Pricing Conditions-Based Alternative Bids in the Classic UI of SAP Ariba Sourcing

Use this procedure to enable pricing conditions-based alternative bids from the classic UI of SAP Ariba Sourcing. Note that the pricing conditions feature is available only on sites that have SAP Ariba Strategic Sourcing Suite enabled.

Prerequisites

- To be able to create or edit sourcing templates, you must be a member of the global **Template Creator** group or the template project's **Templates Creator** team.
- To be able to create or edit sourcing templates, you must be the event owner or have project owner capabilities for the event.

Context

When support for pricing conditions in alternative bids is enabled, suppliers can create alternative bids with different prices for each term that is configured as a pricing condition. If buyers have enabled supplier defined validity periods and allowed supplier scales, suppliers can change validity periods and quantity scales in alternative bids.

You can enable pricing conditions in alternative bids from the template or at the event level. To be able to enable pricing conditions-based alternatives at the event level, you must have set the **Can edit the pricing conditions terms in alternatives** rule to **Delegated**.

To enable pricing conditions-based alternative bids:

Procedure

1. Based on whether you want to create a new template or edit an existing template, follow the steps as explained in:
    - Creating New Project Templates
    - Editing a Project Template
2. When you create or edit a template, ensure that the following event rules are set to **Yes**:
    - **Can participants create alternative responses**
    - **Can participants create alternative pricing**

    > ⓘ Note
    >
    > Alternatively, you can choose to set these rules as **Delegated** so that the rules can be configured at the event level.
3. Set the **Allow pricing conditions** rule to **Yes**.

    > ⓘ Note
    >
    > This rule cannot be delegated and needs to be configured at the template level.

    When **Allow pricing conditions** is set to yes, the **Can edit pricing condition terms in alternatives** rule appears along with the other pricing conditions-related rules.
4. Set the **Can edit pricing condition terms in alternatives** to **Yes**.

    If you want to enable the event owners to configure this, you can set the **Can edit pricing condition terms in alternatives** rule as **Delegated**.

Results

When all the rules listed in this procedure are set to **Yes** in the template and are not modified at the event level, suppliers can create alternative bids based on pricing conditions.

> ⚠ Limitations
>
> During the course of an event, if you choose to compare bids received from suppliers by downloading the details to an Excel file from the event monitoring interface, alternative bids based on pricing conditions are not shown in the **Bid Comparison** sheet.

For the rules that can be modified at the event level - that is, when the rule is set as **Delegated** - users creating or editing an event can modify the rules appropriately at the event level to enable suppliers to create alternative bids based on pricing conditions.

Japanese Auction Characteristics

Features and types of Japanese auctions are described, including characteristics that prevent bidders from determining the end price.

General Characteristics of Japanese Auctions

In a reverse Japanese auction, you are buying and the price level falls at each configured interval; in a forward Japanese auction, you are selling and the price level rises at each interval. Participants choose to accept price levels as they drop (or rise). By default, a participant who does not accept a price level for an item becomes inactive and is unable to accept any further price levels for the item.

Bidding ends for an item when either of the following occurs:

- The number of active participants drops to or below the configured minimum value.
- The target price is reached.

A Japanese auction has these characteristics:

- Participants can't submit bids during the preview period. If the **Can Participants Place Bids During Preview Period** event rule is set to allow bids during the preview period, participants can't submit bids during the preview period but can submit answers to event questions.
- Participants must act immediately when bidding opens. In a Japanese auction, a participant must submit an approval or risk being dropped from the event. (By contrast, in non-Japanese auctions, participants can choose to wait to participate until the event end nears.)
- Multiple items use serial bidding. One lot or item is open for bidding. When it closes, the next one opens.
- No overtime option.
- Participants can't import responses using Microsoft Excel.

Types of Japanese Auctions

Japanese auction functionality is supported in the following auction formats:

Event Formats	Description
Japanese reverse auction	You use this auction type to create a Japanese style competitive bidding event for line items and/or lots.
Japanese forward auction	You use a Japanese forward auction to sell things, such as surplus inventory. Invite prospective buyers to bid in the event.
Japanese forward auction with bid transformation	You use a forward auction with bid transformation to sell things, such as surplus inventory. Bid transformation allows you to "transform" buyers' bids by adding cost terms you define. This causes buyers to compete on your total costs, instead of on their raw prices.
Japanese reverse auction with bid transformation	You use a bid transformation auction to create a competitive bidding event for line items and/or lots, including factors other than price.

Japanese Auction Characteristics That Prevent Bidders from Determining the End Price

- The event doesn't display the end time, including on the supplier dashboard and **Review Event Details** page.
- Bidders, whether active or not, don't get any email indicating that the event has ended or is in **Pending Selection** state.
- Except for email indicating that the event has ended or is in **Pending Selection** state, active bidders get all other notifications while the event is open.
- If the event is paused, bidders who have dropped out aren't notified.
- To bidders who have dropped out, the event appears to be in **Pending Selection** state and there's no indication (such as a blinking line item) that other bidders may still be bidding.
- On the supplier's dashboard, event status is shown according to whether a bidder is active or has dropped out. Bidders who have dropped out appear under **Pending Selection** even when the event is still open.
- If the market feedback rule **Hide winning message from participants** is set to **Yes**, and if bidding is scheduled to end when no more participants remain, then the last participant to drop out gets a neutral message that doesn't tip them off to the fact that they were the final bidder.

Creating Japanese Auctions

Use this procedure to create a Japanese auction. Japanese auctions require suppliers to accept pricing at levels that automatically adjust at regular intervals.

Prerequisites

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)

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

An SAP Ariba Customer Support representative must run a scheduled task to install Japanese auction templates. To install Japanese auction templates, have your Designated Support Contact log a service request. An SAP Ariba Customer Support representative will follow up to complete the request.

Procedure

1. On the dashboard, click **Create** > **Sourcing Project**.
2. For the event type, choose **Auction**, if you are buying; choose **Forward Auction**, if you are selling.
3. From the list of event templates, choose the **Japanese Reverse Auction** or **Japanese Reverse Auction with Bid Transformation** templates, if you are buying or the **Japanese Forward Auction** or **Japanese Forward Auction with Bid Transformation** templates if you are selling.
4. Click **Create**.
5. Add team members [page 45].
6. Set event rules. Click **Rules** on the left side of the **Event** page.

> **Note**
>
> An event rule might not be visible or editable in events, depending on how the rule is configured by the template author. For more information about event rules, see Event Rules Reference Guide.

The key rules for Japanese auctions are:

- Event **Timing Rules**
  - **Can Participants Place Bids During Preview Period**
    In a Japanese auction, "bids" during the preview period means responses to questions. Actual bids on lots and items are not allowed during the preview period in a Japanese auction. In general, a Japanese auction is better when participants are prequalified, but if you have questions you want to ask before the bidding starts, allow or require "prebids."
  - **End bidding when the number of active participants reaches this value**
    The minimum number of active participants for a given item. Bidding ends for the item when the number of active participants drops to or below this value.

Default value: 0 (bidding ends based on the target price).

- **Bid adjustment interval**
  The interval between rounds (price level adjustments). The lowest possible value is 30 seconds.
  Default value: 5 minutes (for reverse auctions, the price decreases every 5 minutes; for forward auctions, the price increases every 5 minutes).

- Event **Bidding Rules**
  - **Adjust bid amount by**
    Specifies if the price is adjusted by a fixed amount (**Nominal amount**) or by a percentage of the current price (**Percentage**) for each round. Event owners configure the adjustment values in the bidding rules for each item.
    Default value: **Nominal amount**.
  - **Eliminate participant who misses this number of consecutive rounds**
    Specifies that a participant who misses this number of consecutive rounds (price level adjustments) is eliminated from the event. If you want participants to be able to miss one round, set this rule to **2**. If you set the rule to **1**, it's the same as setting it to **0**. Participants will have to participate in all rounds to remain in the event.
    Default value: 0 (a participant must participate in every round to remain in the event).
- Event **Market Feedback** rules
  - **Show number of active participants**
    Shows the number of active participants.
    Choices: **Do not show at all** (none of the participants can see the number of active participants), **All participants**, or **All active participants only**.
    Default value: **Do not show at all**.
  - **Show number of participants who are inactive**
    Choices: **Do not show at all** (none of the participants can see the number of inactive participants), **All participants**, or **All active participants only**.
    Default value: **Do not show at all**.
  - **Show ceiling price to all participants**
    Show the target price (lowest price for reverse auctions or highest price for forward auctions) to all participants.

    > → Tip
    >
    > In most cases, you want to set this rule to **No** so participants can't see your target price.

    Default value: Yes.
  - **Hide winning message from participants**
    When set to **Yes**, bidders, whether active or not, do not get any email indicating that the event has ended or is in **Pending Selection** state.
    Default value: **No**. A participant who is active in the last round that has active participants receives a message indicating whether the participant submitted the best bid (accepted the best price level) or was one of multiple participants who submitted the best bid.

7. Invite participants. Click **Suppliers** (or **Participants**, if you are creating a forward auction) on the left side of the **Event** page. Click **Invite Participants** and search for participants.

   See Inviting Event Participants [page 52] for more information.

8. Add items, set item terms, and set item **Bidding Rules**. Click **Content** on the left side of the **Event** page.

For a reverse Japanese auction, set the initial price to the highest price you are willing to pay (the price will decrease each round). For a forward Japanese auction, set the initial price to the lowest price at which you are willing to sell.

The item **Bidding Rules** for Japanese auctions are:

- **Bid adjustment**
  The amount by which the price changes for each round.
- **Range**
  Price range (lower and upper value). For Japanese reverse auctions, the target price is the lower value in the range; bidding ends for the item when the price level is less than or equal to the lower value.
  For Japanese forward auctions, the target price is the upper value; bidding ends for the item when the price level is greater than or equal to the upper value.
  The initial price for the item must be within the lower and upper range values, inclusive.

  > Note
  >
  > In a forward auction where price levels are adjusted by a percentage of the current price (**Adjust bid amount by** is **Percentage**), set the initial price to be greater than 0; if you set the initial price to 0, the price level won't change.

9. Configure any remaining items for the auction and publish the auction.

Example

A buyer creates a Japanese reverse auction for an item with an initial price of $100 USD and the following settings:

- Event rules
  - **End bidding when the number of active participants reaches this value**: 1
  - **Bid adjustment interval**: 10 minutes
  - **Adjust bid amount by**: **Nominal amount**
  - **Eliminate participant who misses this number of consecutive rounds**: 0
- Item bidding rules
  - **Bid adjustment** : 1 ($1 USD)

The buyer invites five suppliers. During the auction, the item price drops $1 USD every 10 minutes. All five suppliers accept the price at the $100 USD price level, and move on to compete at the $99 USD price level. Four suppliers accept the $99 USD price level and move on to compete at the $98 USD price level. The supplier that did not accept the $99 USD price level is dropped from the auction and is unable to accept any further price levels. Bidding continues at each price level until there is only one supplier (Supplier 3) left in the auction.

Next Steps

From the **Bid Console**, you can click an item and:

- Extend or shorten the bidding time for an item open for bidding.

- Reopen an item for bidding. This is useful if a participant unintentionally failed to submit an acceptance for a price level and was dropped from bidding. Bidding for the event reopens at the initial price and price level acceptances previously submitted by participants are automatically resubmitted.

RFPs with Pricing Conditions

You can request pricing from suppliers for line items by defining pricing conditions in the RFP sourcing events. Specifying pricing conditions for line items enable buyers to request pricing from suppliers for different validity periods (for example, monthly, quarterly, annually, or custom) and for different volume scales. Collecting pricing over time and volume can lead to more accurate pricing. Event owners can define validity periods and volumes scales, 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.

If your site has SAP Ariba Strategic Sourcing Suite enabled, you can request pricing from suppliers for line items by defining pricing conditions in the RFP sourcing events. SAP Ariba supports integration for regular RFx and contracts with or without pricing conditions data. If pricing conditions data exists, PIRs are created with specific validity periods, otherwise validity periods are set to the current month and never end.

> ⓘ Note
>
> PIR data is not sent to the external system if any of the following conditions are true:
>
> - Your site does not have the SAP Ariba Strategic Sourcing Suite
> - The line item is an ad hoc line item (a line item that does not originate from ERP RFQ data)
> - The line item does not contain a **Material Number** term

Pricing condition information is included when you and suppliers import and export sourcing event data. Pricing condition information is included on the **Pricing Conditions** sheet in the sourcing event data Excel file. The **Pricing Conditions** sheet shows the pricing for different validity periods and volumes. Suppliers can add their volume pricing values and import the updated Excel file.

If your site has the SAP Ariba Strategic Sourcing Suite, you can report on the **Validity Period Start Date** and **Validity Period End Date** fields in the Event Item Summary Reporting Fact. If your site does not have the SAP Ariba Strategic Sourcing Suite, the **Validity Period Start Date** and **Validity Period End Date** fields display the value Unclassified in reports.

If you've enabled guided sourcing in SAP Ariba Strategic Sourcing Suite, you can define pricing conditions in guided sourcing events. For more information, see About Using Pricing Conditions in Guided Sourcing Events.

Prerequisites for Pricing Conditions

- To use pricing condition for line items, you must set the **Allow Pricing Conditions** rule to **Yes** in the **Bidding Rules** section of the RFP event template.
- To configure item terms with pricing conditions, the **Add term to Pricing conditions** option for the item term in the sourcing event template must be set to **Yes**.

- To use a predefined value for the **From** scale type, you must set the `Application.ACM.PricingConditionsFirstVolumeScaleValue` parameter value in the SAP Ariba Administrator page of your SAP Ariba solution. Contact SAP Ariba support to set the parameter value.

Pricing Conditions for Volume and Time Breaks

SAP Ariba enables you to define optional volume scales. For example, you may want to collect pricing for items at the 500, 1000, and 1500 volume tiers. You can specify a volume scale type for the volume scales. You can also map validity periods on pricing conditions to your external SAP ECC system.

Event owners can set validity periods in the event and they can specify pricing condition settings as part of the term's attribute definition. You can define different price terms for the following term types: Money, Single line, Single line limited, Whole number, Extended Price, Decimal, Quantity, and Percentage.

Pricing conditions for volume and time breaks functionality enables you to:

- Define validity periods (monthly, quarterly, annually, or custom) for volume pricing
- Define volume scale types and volume scales within each validity period
- Allow suppliers to create their own validity periods
- Add cost terms for validity periods

The volume scale type you define for a line item in the sourcing event can be a **From** scale or a **To** scale. After you choose a volume scale type, you can define volume scales. Volume scales can be based on quantity, value, gross weight, volume, or net weight. Depending on the selection of the volume scale type, the defined scale determines different prices based on different volumes of the line item.

> ⓘ Note
>
> For an RFP event, any update or addition that you make to the **Bidding Rules** > **Scales** rule in a subproject applies only to new line items. However, you can manually update the **Scales** value for existing line items. To manually update the **Scales** value for the line items:
>
> 1. From the **Content** tab of the **Event** page, select the required line items.
>   Note that you must select at least one of the newly created line items.
> 2. Click **Edit** > **Pricing Conditions** > **OK**.

If you are using a **From** scale, you can also set a minimum value for the **From** scale in your SAP Ariba solution. Contact SAP Ariba support to set the minimum value. For example, if you specify 100 as the minimum value for the **From** scale, the pricing conditions page shows every line item with the first scale option as 100 by default.

> ⓘ Note
>
> - Defining a scale with value 0 for the **To** scale is not allowed.
> - To disable the **From** scale pricing condition setting, the `Application.ACM.EnableFromScaleInPricingCondition` parameter value in the SAP Ariba solution must be set to **No**. Contact SAP Ariba support to set the parameter value.

For more information on different pricing condition settings, see Allow pricing conditions.

Add term to pricing conditions rule

The **Add term to Pricing conditions** rule is available on the **Add Term** and **Edit Term** pages. Choose **Yes** to include the term when collecting price by volume information. When the **Add term to Pricing conditions** rule is enabled, a **View pricing conditions** link appears in the **Item Terms** section on the **Add Item** and **Edit Item** pages. You can click **View pricing conditions** to view the volume scale, validity period, and the cost terms. Pricing condition functionality supports the following answer types:

- Text
- Short String
- Whole Number
- Money
- Extended price
- Decimal Number
- Quantity
- Percentage

> ⓘ Note
>
> By default, a line item in an event template contains the **Price**, **Quantity**, and **Extended Price** terms. You can configure these terms to use pricing conditions by enabling the **Add term to Pricing conditions** rule. When you configure the **Price** term to use pricing conditions, the **Extended Price** term is automatically configured to use pricing conditions. If you do not want to use **Extended Price** with pricing conditions, you can remove the **Extended Price** term from the event template and retain only the **Price** term.

If your site is integrated with SAP ERP, then the follow-on documents such as purchase orders, contracts, and scheduling agreements created in SAP ERP based on the award information from SAP Ariba Sourcing supports the use of pricing conditions for item terms of percentage, quantity, and decimal number answer types. Note that the you must implement the necessary mappings to support integration of pricing conditions for item terms of decimal, quantity, and percentage answer types. For more information, see RFQ and award integration with SAP Ariba Sourcing.

> ⓘ Note
>
> If the sourcing event contains Discount Percentage and Surcharge Percentage item terms, ensure to use custom mappings for these terms in SAP Integration Suite, managed gateway for spend management and SAP Business Network.

You can also create PIRs in SAP ERP based on the award information from SAP Ariba Sourcing. PIRs now support the use of pricing conditions for item terms such as Surcharge Percentage and Discount Percentage.

Pricing Trends graph

A **Pricing Trends** graph is available on the event **Content** page. The **Pricing Trends** graph shows supplier prices plotted against the validity period and volume scale. You can view pricing trend data for different items by choosing an item from the **Select Item** pull-down menu.

Period Quantity graph

The value in the **Quantity** field links to the **Period Quantity** graph when period quantity data is entered. The **Period Quantity** graph shows quantity values plotted against the validity period.

Pricing Condition Mass Edit

You can mass edit pricing condition information on the **Content** page. A new **Pricing Conditions** option is available in the **Edit** pull-down menu on the **Content** page. Buyers can select multiple items and choose **Edit** > **Pricing Conditions** to edit the pricing condition information for those items at the same time.

A new **Edit Pricing Conditions** popup screen appears after buyers choose **Edit** > **Pricing Conditions**. The **Edit Pricing Conditions** screen displays all the pricing condition bidding rules for the event.

Restrictions for Pricing Conditions

- Validity periods are available in contracts and RFPs, but they are not available in auctions.
- Pricing conditions such as validity periods and scales are supported only for material items and does not support service line items.
- You cannot configure the default Quantity item term that appears in the sourcing event template to use pricing conditions.
- PIRs do not support custom item terms with pricing conditions.
- The Pricing condition functionality is not available for Out-of-the-Box (OOTB) terms, and the **Add Term to Pricing Conditions** rule does not display for these terms.
  For example, OOTB terms such as **Total Cost**, **Unit Cost**, **Best Extended Price**, **Best Price**, and certain formula-based **Money** answer type terms cannot be used as pricing conditions. To configure item terms with pricing conditions, create a new term and select **Yes** in the **Add Term to Pricing Conditions** option.

Enabling Price by Time in RFP Templates

Use this procedure to enable price by time in RFP templates.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Only a representative from SAP Ariba Customer Support can enable and configure the default project type functionality. By default, this functionality is disabled. This functionality applies to all users with the permission to create sourcing projects.

> ⚠ Restriction
>
> Creating templates is a separate feature. To enable this feature, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will follow up to complete the request.

Context

A template consists of rules, a place for the project owner to specify suppliers, content such as questions, and a summary. While configuring a template, you configure each of these steps in a separate operation.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. From the **Documents** tab on the **Templates** page, click the name of an RFP sourcing template.
3. Choose **Action** > **Edit**.
4. In the **Bidding Rules** section, click **Yes** to enable the **Allow Pricing Conditions** rule.
   SAP Ariba displays the **Validity Period Type**, **Start Date**, **Number of Periods**, and **Enable period quantity** fields.
5. Enter values as needed in the following fields:
   - **Validity Period Type**. This field is required. This rule determines the type of period for which you want to collect pricing.
   - **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.
   - **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.
6. Choose to delegate, hide, or make the pricing condition bidding rules read-only.
7. Publish the template.

Downloading the Bid Comparison Excel File

Use this procedure to download the bid comparison Excel file.

Prerequisites

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)

Context

You can export a Microsoft Excel file containing the pricing conditions for each validity period and item and supplier combination.

The bid comparison Excel file includes two sheets:

- **Overview Sheet**. This sheet includes information about the event. For example, the event name, publish date, event owner, and event type.
- **Bid Comparison**. This sheet displays supplier bid data, including pricing condition and volume information. Initial supplier values appear in shaded gray cells. Supplier values appear in color shaded cells. Each supplier has their own corresponding color.

> ⚠ Limitations
>
> Pricing conditions-based alternative bids are not shown in the **Bid Comparison** sheet.

Procedure

1. Use one of the following methods to download the pricing comparison Microsoft Excel file in the event monitoring interface:
   - On the **Content** tab, click **Download Bid comparison**.
   - After you create a manual scenario on the **Scenario** tab, click **Download Bid comparison**.
2. Save the file to your computer.

Creating a Price Acceptance Scenario

Use this procedure to create a price acceptance scenario.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The price acceptance scenario enables you to choose items for which you want to create a purchasing information record (PIR).

Procedure

1. On the **Scenario** tab, choose **Create** › **Price Acceptance Scenario**.
2. Enter a name for your scenario in the **Name** field.
3. Choose the items for which you want to create a PIR. You can choose items in the following ways on the **Price Acceptance Details** page:
   a. Choose a supplier from the **Select Supplier** pull-down menu. This automatically chooses all the items under that supplier.
   b. Choose individual items by checking the corresponding checkboxes.
4. Optionally, click **Excel Import**.
   a. Click **Click here to open your Scenario in an Excel Spreadsheet**.
   b. Save the content to your computer.
   c. Edit the spreadsheet in Microsoft Excel.
   d. Review the instructional worksheets and note the background colors that indicate which cells are required, optional, or read-only.
   e. Open the **Award Allocation** worksheet and indicate the items for which you want to create a PIR.
   f. Save the edited Excel spreadsheet to your computer.
   g. Return to the **Import Scenario from Excel** page. Click **Browse** and locate your edited Excel spreadsheet.
   h. Click **Upload**.
5. You can click **Save As** to save a copy of the scenario you are working on.
6. Click **Create and send PIR**. This creates PIR information and sends it to the external system.

   > Note
   >
   > If no external system is maintained, an error message that states *Business system is not created* appears.

7. Click **Save** to save and exit the scenario. The scenario appears as **Price Acceptance Scenario** on the **Scenario** tab.

The **Price Acceptance Scenario** can be edited and viewed, similar to manual scenarios on the **Scenario** tab. You can update the scenario and submit it when you are ready.

Mass Editing Item Pricing Conditions

Use this procedure to mass edit item pricing conditions. If you need to update pricing condition bidding rules for multiple items, you can update all the items at the same time.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can perform mass edits on the **Content** page.

Procedure

1. On the **Content** tab of the **Event** page, select the items you want to update.
2. Choose **Edit** > **Pricing Conditions**.
   SAP Ariba displays the **Edit Pricing Conditions** page.
3. Update the pricing condition rules as needed.
4. Click **OK**.

Results

The pricing condition rules for the selected items are updated.

Creating New Contracts from Events with Price by Volume Data

Use this procedure to create new contracts from events with price by volume data.

Prerequisites

To see this option, you must be in a group that has permission to create contracts.

Context

The following information carries over from the event to the contract:

- Supplier name
- Pricing terms (in the **Documents** tab)
- Volume and validity period data
- Project owner (as the contract workspace owner)
- SAP Ariba Sourcing project name (as the predecessor project)

Procedure

1. Choose **Contract** › **Create New Contract**.
2. Select the supplier.
3. Click **Create New Contract**.
4. The **Create Contract Workspace (Procurement)** page displays.
5. Enter the required information on the **Create Contract Workspace (Procurement)** page.
6. Choose **Create Contract Line Items Document** from the **Select the type of Content Document to create** screen.

   The price by volume information is now available in the contract line items document.
7. Click the **Documents** tab.
8. Open the line items document and click **View pricing conditions** in the **Price** column to view the price by volume information.

Creating Partitioned Events

Use this procedure to create partitioned events. You can configure a sourcing event so that certain team members can invite their own set of participants to the event and view only responses from the suppliers they added.

Context

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.

Procedure

1. Navigate to the **Team** page in a draft event. In the **Team Members** section, add one of the following roles to a new or existing group: **Sourcing Content Editor**, **Sourcing Supplier List Editor**. Add users to this group.

   Members of a project group with the **Sourcing Content Editor** role can add suppliers and edit content if the group is configured in the **Additional Editor Groups** field for a specific question, item, or term.

   Members of a project group with the **Sourcing Supplier List Editor** role can add suppliers but cannot edit content.

   > ⓘ Note
   >
   > Do not add the **Project Owner** role to this group; if you do, members of the group can see all participants and responses and have all project owner capabilities. In addition, any user you add to this group who is also a member of a global group that gives them project owner capabilities (listed in Project Owner group and capabilities) can see all participants and responses.

   > ⓘ Note
   >
   > If you create an event in a full project and the full project has a project group with the same name and the same additional editor role (**Sourcing Content Editor** or **Sourcing Supplier List Editor**), the group members specified in the full project are used in the event (the group members specified in the full project override the group members specified in the event).

2. **Optional:** To allow members of a group with the **Sourcing Content Editor** role to edit content:
   a. Navigate to the **Contents** page. Select a question, line item, or section and click **Edit**. For a term, select a line item, then navigate to the **Item Terms** section; select the term and click **Edit**.

b. On the edit page, navigate to the **Additional Editor Groups** field and enter the project group with the **Sourcing Content Editor** role.

Results

Team members in groups with the **Sourcing Supplier List Editor** role (SSLE team members) or **Sourcing Content Editor** role (SCE team members) and who do not have project owner capabilities can see the following differences in sourcing event pages:

Page or Context	Changes
Draft events	SSLE and SCE team members see only **Suppliers**, **Contents**, and **Summary** pages (they cannot see the **Rules** or **Team** pages). On the **Suppliers** page, SSLE and SCE team members see only the participants that they invited. If a team member attempts to add a participant that has already been invited by another team member or the project owner, they get an error message. On the **Content** page, SSLE and SCE team members cannot add content. SCE team members can edit a specific question, line item, or term if the project owner or template author configured the group in the **Additional Editor Groups** field. When a member of a group configured in **Additional Editor Groups** chooses the edit option for the terms and conditions, they can see the original terms and conditions in the Initial Value field, and can upload a separate terms and conditions document for the suppliers they invite. On the **Summary** page, SSLE and SCE team members see the details of only the suppliers they have invited, and they cannot publish the sourcing event.
Suppliers tab on the event monitor page	SSLE and SCE team members who invited the suppliers see only the suppliers that they invited in the Invited Participants list. SSLE and SCE team members see only messages sent by the suppliers they have invited.
Messages tab on the event monitor page	SSLE and SCE team members see the messages sent to and received from only members of the Project Owner group or other team members. They can see messages sent to and received from only the suppliers they have invited.
Scenario tab on the event monitor page	SSLE and SCE team members can view manual scenarios but only the awarded quantities or amounts for the suppliers they have invited is shown. Team members cannot create scenarios or awards.

Page or Context	Changes
Award tab on the event monitor page	The team members see the award details of only the suppliers they have invited. Team members cannot create scenarios or awards.
Log tab on the event monitor page	Team members can see only the logs corresponding to the suppliers they have invited.

Project owners see all participants and responses. On the **Supplier** page, the column **Invited by** specifies the buyer user who invited the participant.

Supplier-Added Items in Events

You can create events that let suppliers add items and lots to primary and alternative bids.

To create an event that lets suppliers add items and lots, a template author (user with **Template Creator** capabilities) must create an event template with event rules and definitions for supplier-added items, as described in Configuring Event Templates for Supplier-Added Items [page 501].

After an event is created from a template that allows supplier-added items and the event opens for responses, a supplier can click **Add New Lot** on the lot selection page to add items and lots. If the **Allow supplier-added items only in alternative bids** rule was set to **No**, suppliers can add items and lots in their primary bids; if this rule was set to **Yes**, suppliers can add items and lots only in alternative bids.

After a supplier adds an item, they can submit a bid for the item. If a **Supplier Item with Child Items or Service Hierarchy** was defined in the template, the supplier can select **Is this a group of items or services** and upload an attachment that describes child items or services.

> ⓘ Note
>
> The attachment can be in any format. SAP Ariba Sourcing does not create child items or a hierarchy from the attachment.

Creating Events That Allow Supplier-Added Items

Use this procedure to create events that allow suppliers to add items and lots and bid on them.

Prerequisites

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)

Context

To create events that allow supplier-added items, your site must have event templates with the appropriate settings and definitions. For more information, refer to Configuring Event Templates for Supplier-Added Items [page 501].

The event rules you can set and view depends on how rules are delegated in the template used to create your event.

Procedure

1. Create a sourcing event project using a template that is configured for supplier-added items.
2. Set the **Allow suppliers to add items** bidding rule to **Yes** if it is available and not already set to **Yes**.
3. Enter a value for **Maximum supplier-added items for each supplier** in the **Bidding Rules** section on the **Rules** page.
4. To restrict supplier-added items to alternative bids, set the following event rules to **Yes**:
   - **Can participants create alternative responses?**
   - **Allow supplier-added items only in alternative bids**
5. Select **Content** in the left menu panel to add lots and line items to the event.
6. **Optional:** If you're creating an event that also allows alternative bids, configure options for alternative bids [page 229].
7. Publish the event.

Results

When the event opens for responses, a supplier can click **Add New Lot** on the lot selection page to add items and lots. If the **Allow supplier-added items only in alternative bids** rule was set to **No**, suppliers can add items and lots in their primary bids; if this rule was set to **Yes**, suppliers can add items and lots only in alternative bids.

Creating Postings on SAP Business Network Discovery

About SAP Business Network Discovery Postings

Supplier Discovery Postings provide a low-cost way to increase your potential supplier base, reduce the cost of acquiring and managing suppliers, and increase competition among suppliers. It helps you to solicit interest among suppliers of specific commodities and services on SAP Business Network Discovery.

> ⓘ Note
>
> Although SAP Ariba Sourcing can easily connect and interoperate with SAP Business Network Discovery, SAP Business Network Discovery and SAP Ariba Sourcing are separate products.

A posting lists the commodity or service, project amount, contract length, and the territory where the business will occur. Before you can create a posting, your SAP Ariba Sourcing solution must be connected to SAP Business Network Discovery.

When you publish a posting, SAP Business Network Discovery sends an email inviting all suppliers in the SAP Business Network Discovery that match the specified commodity area and territory to respond. You can also search for individual suppliers and products on SAP Business Network Discovery and request for information. You can also search for individual suppliers and products on SAP Business Network Discovery and request information from them. That way, you are not limited to suppliers in your own supplier database, though you can include any of your own suppliers in the invitation. With a posting you can access a wide group of suppliers.

> ⓘ Note
>
> - In SAP Business Network Discovery, request for quotation (RFQ) and all discovery postings, both old and new, are treated as RFIs (Request for Information).
> - Due to privacy concerns, including email IDs and phone numbers in the title and description of discovery RFIs is not allowed.

When a supplier responds to the posting, you receive an email. When you check the responses in SAP Business Network Discovery, you can also review the supplier's profile, qualifications, and rating, and then import their profile data into SAP Ariba Sourcing if they qualify.

Restrictions

- Test RFIs cannot be created from the classic sourcing realm; they can only be created if Guided Sourcing is enabled.
- The response deadline does not get automatically displayed to the discovery RFI when sourcing event is scheduled. Users must manually enter the response deadline in the discovery RFI.

Related Information

Configuring Your Company Alias in SAP Business Network Discovery [page 258]
Hiding Your Company Profile in SAP Business Network Discovery [page 259]
Searching for SAP Business Network Discovery Suppliers [page 259]
Importing Suppliers from SAP Business Network Discovery to SAP Ariba Sourcing [page 261]
Creating SAP Business Network Discovery Postings for Private-Sector Events in SAP Ariba Sourcing [page 262]
Importing and Inviting SAP Business Network Discovery Suppliers to Private-Sector Events in SAP Ariba Sourcing [page 266]
Creating SAP Business Network Discovery Postings for Public-Sector Events in SAP Ariba Sourcing [page 268]

SAP Ariba Start Sourcing SAP Business Network Discovery Posting Requirements

SAP Ariba Start Sourcing users must create a **Supplier Discovery Posting** before they can publish an RFP, RFI, or reverse auction. **Supplier Discovery Posting** requirements in SAP Ariba Start Sourcing do not apply to test events.

Managing Postings on SAP Business Network Discovery

You can edit, shortlist, close, and terminate your postings. Once a posting has been shortlisted, closed, or terminated, you cannot change its status. Closing a posting changes the status of the posting to Closed and notifies participating suppliers. Terminating a posting removes it from SAP Business Network Discovery and notifies participating suppliers.

Managing Questions and Answers for RFIs on SAP Business Network Discovery

Suppliers can request additional information about an RFI on the SAP Business Network Discovery before submitting their responses.

Once a supplier submits a question, the buyer is notified and can view the question in the Q&A section in the RFI. Buyers can view questions submitted by a supplier through the discovery RFI, which can be accessed by navigating to **Create** > **SAP Business Network Discovery**.

Buyers have the option to make the question visible to all suppliers, helping to prevent repetitive inquiries. After the buyer responds, the supplier who asked the question is notified via email and can also access the answers in the Q&A section in the RFI.

Managing RFI Message Responses on SAP Business Network Discovery

Before making a decision regarding a supplier, buyers have the opportunity to seek additional clarification on a supplier's response. This can be done by asking questions within the **View Response** section in the RFI.

When a buyer submits a question, the supplier is notified and can also access the question within their submitted response. The question is available in the **View Response** section of the respective RFI. Buyers can submit questions regarding supplier responses through the specific discovery RFI, which can be accessed by navigating to **Create** > **SAP Business Network Discovery**.

Once the supplier responds to the question, the buyer receives an email notification and can also find the response in the individual response section in the RFI.

Editing Postings

After you edit a posting, the modified posting is republished and notifications are sent to suppliers that already responded that they might want to revise their responses. As a best practice, clearly indicate your changes so that suppliers that have posted responses can easily identify the changes you have made and update their responses accordingly. This process is applicable to supplier research postings only.

Closing Postings

While editing a posting, you can also choose to close it. Suppliers who have responded are notified that the posting has been closed by the buyer without awarding it. This process is applicable to supplier research postings only.

Terminating Postings

Suppliers who responded are notified that the buyer has deleted the posting without awarding it. This action is allowed only for supplier research postings.

Configuring Your Company Alias in SAP Business Network Discovery

Use this procedure to configure your company alias in SAP Business Network Discovery.

Prerequisites

- You must have the **Company Information** permission.

Context

If you choose to hide your company name during the posting creation process, suppliers will see your company alias instead of your actual company name.

> ⓘ Note
>
> Keep your company alias anonymous to preserve your company's anonymity in postings.

Procedure

1. Click **create posting** under **quick menu** or in the posting homepage.
2. Click **hide my company name**.
3. Enter a brief but anonymous name for your company in the **Company Alias** field.

Related Information

About SAP Business Network Discovery Postings [page 255]

Hiding Your Company Profile in SAP Business Network Discovery

Use this procedure to hide your company profile in SAP Business Network Discovery.

Context

You can control whether a supplier can view your company profile while accessing your posting.

Procedure

1. On the dashboard, click **Create** > **SAP Business Network Discovery**.
2. Click account settings at the top right of the SAP Business Network Discovery homepage.
3. Click **Manage Profile**.
4. Click **SAP Business Network Discovery Settings**.
5. Select **Do not allow suppliers to view my profile on postings**.
6. Click **Save**.

Searching for SAP Business Network Discovery Suppliers

Use this procedure to search for SAP Business Network Discovery suppliers.

Prerequisites

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)

> **Restriction**
>
> You cannot invite suppliers to events through a posting.

Context

The trading partner search on SAP Business Network Discovery enables you to discover and connect with trading partners. With smart search suggestions, prioritized supplier rankings, and improved search result navigation, it makes easier for you to find trustworthy trading partners and initiate transactions.

Intuitive Search Suggestions

When you type search terms in the search bar, text suggestions for auto-completion or more specific keywords appear below it. These suggestions help you refine your search terms for more accurate results.

Prioritized Trading Partner Ranking

The search results prioritize relevant, reliable, and engaged trading partners based on several factors:

- Relevant catalogs: Trading partners offering the specific item in your search rank higher.
- Verified business: Trading partners with verified businesses rank higher.
- Trading relationships: Trading partners having established trading relationships with more buyers rank higher.
- Complete profiles: Trading partners with complete profiles that include accurate industry and capability-specific terms rank higher.

Improved Search Result Navigation

- Search results show trading partner information along with thumbnails of relevant catalog offerings, if available. Clicking a trading partner's name takes you to their public company profile.
- Trading partners with verified businesses are marked with an (Verified Business) icon next to their names. Trading partners that have reported sustainability ratings in their profiles are marked with an (Reported Sustainability Ratings) icon.
- Additional search filters are provided to help you find the best matches. For example, you can apply a Trading Partner Status filter to locate trading partners with verified businesses or those having established trading relationships with you.

Procedure

1. On the dashboard, click **Create** > **SAP Business Network Discovery** to access SAP Business Network Discovery.
2. Sign in to your SAP Business Network Discovery buyer account.

3. On the homepage, ensure **Trading partners** is selected in the search bar and enter your search terms. Your search terms can include product and service category, product name or description, supplier or manufacturer name, part ID, ship-to or service location, or a combination of them.

   As you type, SAP Business Network Discovery displays suggestions of what you intend to type below the search bar. You can accept a suggestion by selecting it or continue typing.
4. Click the search icon (🔍) to start the search.

   The search results page opens, displaying top-ranking trading partners along with the thumbnails of their catalog offerings that are relevant to your search terms.
5. On the search results page, you can:
   - Refine your results by selecting one or more filters from the **Filters** pane.
   - View additional search results by clicking the page numbers at the bottom.
   - Access a trading partner's company profile by clicking their name. From there, you can contact the trading partner directly.

   Once you have identified a supplier:
   - You can reach out to the supplier using a request for information button in the search results or by clicking on the supplier name and landing on their profile.
   - You can import the supplier as an approved or unapproved supplier in the supplier management.

Related Information

About SAP Business Network Discovery Postings [page 255]
Importing Suppliers from SAP Business Network Discovery to SAP Ariba Sourcing [page 261]

Importing Suppliers from SAP Business Network Discovery to SAP Ariba Sourcing

Context

You can import SAP Business Network Discovery suppliers into SAP Ariba Sourcing.

Procedure

1. Locate the posting in the posting homepage in the **Discovery** tab in SAP Business Network Discovery.
2. Access the posting in which you have received responses.
3. Click the check box next to the supplier you want to import into SAP Ariba Sourcing and click **Import to Sourcing.**

SAP Ariba displays the **Import to Sourcing** page.

4. If you belong to the **Supplier Manager** group, choose **Import as an approved seller** or **Import as an unapproved seller**. If you do not belong to the **Supplier Manager** group, confirm your choice.
5. Click **Submit**.

   If the supplier already exists in your SAP Ariba Sourcing site, the supplier data in your site is not updated.

Results

After importing a new supplier, you receive a notification message in the dashboard **Notifications** content item.

Next Steps

If the supplier was imported as an unapproved supplier, click the link to approve the supplier. Unapproved suppliers cannot be invited to events until they are approved. If you approve a supplier and later reconsider, you can always reject them.

Related Information

About SAP Business Network Discovery Postings [page 255]
Managing Postings on SAP Business Network Discovery [page 256]

Creating SAP Business Network Discovery Postings for Private-Sector Events in SAP Ariba Sourcing

SAP Business Network Discovery postings enable suppliers who are not part of the buyer's supplier network to express their interest to participate in the event. When you create and publish postings for private-sector events, you can choose to invite all, some, or none of such suppliers.

Prerequisites

- Your site must be integrated with SAP Business Network Discovery.
- 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)

- A member of the **Customer Administrator** group must enable the ICM parameter `Application.AQS.RFX.EnableDiscovery2InClassicSourcing` in the **Intelligent Configuration Manager** workspace.
- The event must be created from a sourcing template with the **Is the sourcing event for the public sector** rule set to **No**.
- The `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 2, 3, or 4 for your site. Contact SAP Ariba Support to configure the parameter.

> Note
>
> - If your site is integrated with the eTendering solution, the `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 1 to enable eTendering. However, with this setting, SAP Business Network Discovery will not be available for your site.
> - If the `Application.AQS.RFX.DiscoveryPostingMode` parameter is set to a value other than 1, SAP Business Network Discovery will be available with guided sourcing.

Context

There are several ways to initiate a SAP Business Network Discovery posting from a sourcing event such as an auction, or by creating an independent posting on SAP Business Network Discovery before you create your sourcing event.

SAP Ariba Sourcing leverages SAP Business Network Discovery to give you the ability to create a SAP Business Network Discovery posting directly from the **Suppliers** page during the event creation process.

While creating an SAP Business Network Discovery posting, you can specify your supplier requirements for private-sector events and publish the posting.

Procedure

1. Access the **Suppliers** page during the event creation process.
2. Click **Create SAP Business Network Discovery posting**.

The **Create posting** page appears.

Alternatively, click **Proceed To Invite Suppliers**. In the **Invited Participants** section, click **Create SAP Business Network Discovery Posting**. Click **Create SAP Business Network Discovery posting**.

3. Specify the following details in the **Let's get started** section:
    1. Click the icon in the **Commodities** field, select the commodities from the popup window, and click **Ok**.

        > **Note**
        >
        > Select the same commodities as those in the event.

    2. Click the icon in the **Regions** field, select regions from the popup window, and click **Ok**.

        > **Note**
        >
        > Select the same regions as those in the event.

    3. Select the **Prefer suppliers physically present in the selected location** checkbox if you want suppliers to be physically present in the location.
    4. In the **Posting title** box, enter the title for the posting.
    5. In the **Posting description** box, enter a brief description of the posting. The **Posting description** box includes a rich-text editor that enables you to add formatting effects, including bold, italic, underlined, and strikethrough text.
    6. To attach a file, click **Upload** and double-click the file you want to attach. Alternatively, drop the file in the **Attachments** box to attach it.
    The maximum file size allowed is 4 MB for an individual file and a total of 10 MB when multiple files are uploaded. You can attach up to five files.
    The supported file types are: PNG, JPEG, JPG, GIF, PDF, XLSX, XLSM, XLSB, XLTX, DOC, DOCM, DOCX, DOT, PPT, PPTX, and TXT.
    7. Click **Next Step**.
4. Specify the following details in the **What is your budget and time frame?** section:
    1. Enter the **Opportunity amount** either in **Custom range** or in **Exact amount**.

        > **Note**
        >
        > Ensure that the currency is the same as that of the event.

    2. Enter the **Contract length** in months.
    3. In the **Response deadline** field, select the date within which the suppliers must respond.

        > **Note**
        >
        > The Response deadline must be at least 24 hours less than the event end time.

    4. Specify the **Award date** if it was not specified for the event.

        > **Note**
        >
        > The **Award date** appears only if you specified it for the event. You can modify the date. However, it is recommended to retain the same award date that is selected for the event.

    5. Click **Next Step**.

5. Specify the following details in the **Choose your supplier preferences** section:
    1. Select the **Sustainability Initiatives** checkbox as required.
    2. Turn on the **Humanitarian relief** toggle and select the humanitarian relief options as required.
    3. In the **Privacy settings** section, you can choose to display the company details:
        1. To hide your company name, select the **Hide my company name** checkbox.
        2. Enter an alias for your company name in the **Company alias** box.

        > ⓘ Note
        >
        > The **Company alias** box appears only when you select the **Hide my company name** checkbox.

        3. To display the contact name, select the **Show my contact name** checkbox.
    4. In the **Publishing settings** section, you can specify the publishing details:
        1. Select the **Publish to third-party sites** checkbox to publish the posting to third-party sites.
        2. Click the icon in the **Third-party sites** field, select the third-party sites from the popup window, and click **Ok**.
    5. Click **Next Step**.
6. To save the posting, click **Save draft**.

    To make further edits, click **Edit** and make the required updates.
7. When you're ready to publish the posting, click **Publish**.

    The posting is published.

Next Steps

Once the SAP Business Network Discovery posting is published, you can view the list of interested suppliers in the **Find new suppliers** section in the **Suppliers** page for the event. Review the supplier responses, import, and invite suppliers that meet your requirements.

> ⓘ Note
>
> After the SAP Business Network Discovery posting is published, you can edit only **Response deadline** and **Award date** in the **Create posting** page.

For more information, refer to Importing and Inviting SAP Business Network Discovery Suppliers to Private-Sector Events in SAP Ariba Sourcing [page 266].

Importing and Inviting SAP Business Network Discovery Suppliers to Private-Sector Events in SAP Ariba Sourcing

After the SAP Business Network Discovery posting is published for a private-sector event, you can import suppliers into the SAP Ariba Sourcing supplier database and invite suppliers to the event.

Prerequisites

- Your site must be integrated with SAP Business Network Discovery.
- 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)
- A member of the **Customer Administrator** group must enable the ICM parameter `Application.AQS.RFX.EnableDiscovery2InClassicSourcing` in the **Intelligent Configuration Manager** workspace.
- The event must be created from a sourcing template with the **Is the sourcing event for the public sector** rule set to **Yes**.
- The `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 2, 3, or 4 for your site. Contact SAP Ariba Support to configure the parameter.

  > Note
  >
  > - If your site is integrated with the eTendering solution, the `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 1 to enable eTendering. However, with this setting, SAP Business Network Discovery will not be available for your site.
  > - If the `Application.AQS.RFX.DiscoveryPostingMode` parameter is set to a value other than 1, SAP Business Network Discovery will be available with guided sourcing.
- The SAP Business Network Discovery posting must be published.

Context

When the posting is published and suppliers show interest in the posting, you can view supplier responses. Based on your requirements, you can import suppliers to the SAP Ariba Sourcing supplier database and invite them to the private-sector event.

Procedure

1. Access the **Suppliers** page of the event.
2. From the **Find new suppliers** section, access the list of interested suppliers.

   You can view the responses and attachments, if any shared by the suppliers.
3. To import suppliers to the SAP Ariba Sourcing supplier database, select the supplier names and click **Import**.
   - If you are not a member of the **Supplier Manager** group and SAP Ariba Supplier Information and Performance Management is enabled at your site, then the selected suppliers are automatically imported as **Unapproved** suppliers.
   - If SAP Ariba Supplier Information and Performance Management is enabled at your site and you are a member of the **Supplier Manager** group, the **Import supplier** popup opens. Select one of the following options and click **Import**:
     - **Mark as approved supplier**: Select this option to import the selected suppliers as approved suppliers.
     - **Mark as unapproved supplier**: Select this option to import the selected suppliers as unapproved suppliers.
   - If SAP Ariba Supplier Management or SAP Ariba Supplier Lifecycle and Performance is enabled at your site, the selected suppliers are automatically imported as **Not Invited** suppliers.
4. To invite suppliers to the SAP Ariba Sourcing event, select the supplier names and click **Invite**.
   - If you are not a member of the **Supplier Manager** group and SAP Ariba Supplier Information and Performance Management is enabled at your site, then the selected suppliers are automatically invited as **Unapproved** suppliers.
   - If SAP Ariba Supplier Information and Performance Management is enabled at your site and you are a member of the **Supplier Manager** group, the **Invite supplier** popup opens. Select one of the following options and click **Invite**:
     - **Mark as approved supplier**: Select this option to invite the selected suppliers as approved suppliers.
     - **Mark as unapproved supplier**: Select this option to invite the selected suppliers as unapproved suppliers.
   - If SAP Ariba Supplier Management or SAP Ariba Supplier Lifecycle and Performance is enabled at your site, the selected suppliers are automatically invited as **Not Invited** suppliers.

Creating SAP Business Network Discovery Postings for Public-Sector Events in SAP Ariba Sourcing

SAP Business Network Discovery postings enable suppliers who are not part of the buyer's supplier network to express their interest to participate in the event. When you create and publish postings for public-sector events, suppliers who express interest in the posting are automatically invited to the event.

Prerequisites

- Your site must be integrated with SAP Business Network Discovery.
- 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)
- A member of the **Customer Administrator** group must enable the ICM parameter `Application.AQS.RFX.EnableDiscovery2InClassicSourcing` in the **Intelligent Configuration Manager** workspace.
- The event must be created from a sourcing template with the **Is the sourcing event for the public sector** rule set to **Yes**.
- The `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 2, 3, or 4 for your site. Contact SAP Ariba Support to configure the parameter.

> ⓘ Note
>
> - If your site is integrated with the eTendering solution, the `Application.AQS.RFX.DiscoveryPostingMode` parameter value must be set to 1 to enable eTendering. However, with this setting, SAP Business Network Discovery will not be available for your site.
> - If the `Application.AQS.RFX.DiscoveryPostingMode` parameter is set to a value other than 1, SAP Business Network Discovery will be available with guided sourcing.

Context

You can create an SAP Business Network Discovery posting specifying your supplier requirements for the public-sector events. You can submit the posting to be published with the event. All suppliers who express interest in the posting are automatically invited to the event.

Procedure

1. Access the **Suppliers** page during the event creation process.
2. Click **Create SAP Business Network Discovery posting**.

   The **Create posting** page appears.

   Alternatively, click **Proceed To Invite Suppliers**. In the **Invited Participants** section, click **Create SAP Business Network Discovery Posting**. Click **Create SAP Business Network Discovery posting**.
3. Specify the following details in the **Let's get started** section:
   1. Click the icon in the **Commodities** field, select the commodities from the popup window, and click **Ok**.

      > Note
      >
      > Select the same commodities as those in the event.
   2. Click the icon in the **Regions** field, select regions from the popup window, and click **Ok**.

      > Note
      >
      > Select the same regions as those in the event.
   3. Select the **Prefer suppliers physically present in the selected location** checkbox if you want suppliers to be physically present in the location.
   4. In the **Posting title** box, enter the title for the posting.
   5. In the **Posting description** box, enter a brief description of the posting. The **Posting description** box includes a rich-text editor that enables you to add formatting effects, including bold, italic, underlined, and strikethrough text.
   6. To attach a file, click **Upload** and double-click the file you want to attach. Alternatively, drop the file in the **Attachments** box to attach it.
      The maximum file size allowed is 4 MB for an individual file and a total of 10 MB when multiple files are uploaded. You can attach up to five files.
      The supported file types are: PNG, JPEG, JPG, GIF, PDF, XLSX, XLSM, XLSB, XLTX, DOC, DOCM, DOCX, DOT, PPT, PPTX, and TXT.
   7. Click **Next Step**.
4. Specify the following details in the **What is your budget and time frame?** section:
   1. The **Opportunity amount** appears either in **Custom range** or in **Exact amount**.

      > Note
      >
      > Ensure that the currency is the same as that of the event.

    2. Enter the **Contract length** in months.
    3. In the **Response deadline** field, select the date within which the suppliers must respond.
    4. Specify the **Award date** if it was not specified for the event.

        > ⓘ Note
        >
        > The **Award date** appears only if you specified it for the event. You can modify the date. However, it is recommended to retain the same award date that is selected for the event.

    5. Click **Next Step**.
5. Specify the following details in the **Choose your supplier preferences** section:
    1. Select the **Sustainability Initiatives** checkbox as required.
    2. Turn on the **Humanitarian relief** toggle and select the humanitarian relief options as required.
    3. In the **Privacy settings** section, you can choose to display the company details:
        1. To hide your company name, select the **Hide my company name** checkbox.
        2. Enter an alias for your company name in the **Company alias** box.

            > ⓘ Note
            >
            > The **Company alias** box appears only when you select the **Hide my company name** checkbox.

        3. To display the contact name, select the **Show my contact name** checkbox.
    4. In the **Publishing settings** section, you can specify the publishing details:
        1. Select the **Publish to third-party sites** checkbox to publish the posting to third-party sites.
        2. Click the icon in the **Third-party sites** field, select third-party sites from the popup window, and click **Ok**.
    5. Click **Next Step**.
6. To save the posting, click **Save draft**.

    To make further edits, click **Edit** and make the required updates.
7. After specifying your requirements, click **Publish with event**.

    The posting is published when the event is published.

    All suppliers who express interest in the posting are automatically invited to the event.

    > ⓘ Note
    >
    > If a publishing failure occurs for the posting, the event is not published.

Creating International Events

About International Events

You can create an event for an international market in which participants can view the event in the language of their choice. You can set up the event in a specific currency, and you can also choose the currency on a per-event basis.

Support for international events includes these features:

- Translated textual information:
  - Your sourcing solution supports several major languages. The program's interface, as well as email notifications, are available in each of these languages. Users access the translated interface by setting the locale field in their user preferences.
  - Next to customer created fields containing textual information, members of the Translator group see a Translate link. Following the link takes them to a page where they can enter translations in all supported languages.
- Multiple Currencies
  - Buyers can set the base currency of their event to be any supported currency. Buyers see all monetary figures using the base currency.
  - Buyers can add additional bidding currencies to the event. Participants can place bids in any enabled bidding currency; the system automatically converts bids into the base currency using exchange rates that the buyers set.

Related Information

Translating Fields in Events [page 275]
Creating Multiple Currency Events [page 277]
Configuring Event Currency [page 278]
Configuring Event Bidding Currencies [page 279]

Translating Textual Information

A feature is included in your sourcing solution for translating selected business data fields in an event so that participants can view the information in the language of their choice. You can translate from your base language into one or more of the supported languages:

- Chinese (Simplified)
- Chinese (Traditional)
- English
- French
- German
- Italian
- Japanese
- Portuguese (Brazilian)
- Russian
- Spanish
- Thai

> ⓘ Note
>
> You might not see the complete list of languages, depending on the configuration of your site. Please contact SAP Ariba Customer Support to change the configuration of your site.

Translatable business data elements are marked with a **Translations** link; these are:

- The project name and description
- Content names or titles
- Content descriptions
- Text initial values (including participant specific initial values)
- Text multiple choice questions
- Email templates (including subject lines and notification content)

Viewing Translations While Monitoring an Event

While monitoring an event, choose **Action** > **View Translations** to view the translations for event content such as sections, line item and lot names, and descriptions.

Base Language

When you create an event, your language (the language specified in your user profile) becomes the base language of the event. You create the content of the event in the base language. Then, you or your translators translate the content into the other supported languages. You cannot change the base language after the event is created.

When suppliers sign in, they see the event in their language (the language specified in their user profile), if available. If you have not translated the event into their language, they see the event in the base language.

This gives you the option to translate only part of the business data. For example, suppose your base language is English, and you are translating your event into French, but you only have budget to translate the introduction, and not the names of the line items. Suppliers that have specified French as their preferred language see all the translated text you provide, as well as the application interface, in French. Untranslated text (in this case, line item names) displays in 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.

Using Multiple Currencies

When adding content to an event, you can set the precision of monetary terms.

The precision that the event creator sets for terms in the event currency applies to terms in all bidding currencies. Suppose, in an event with USD as the event currency, the event creator adds a monetary term with a precision of 4 decimal places. For that term, four decimal places of precision are preset to all participants, regardless of which currency they bid in.

Resetting the Lot Rate

On the **Rules** page, you configure exchange rates for the entire event. You can customize exchange rates for specific lots and line items when you add them to your event.

If you customize exchange rates at the lot or line item-level, and then make changes to the event-level exchange rate, the application does not overwrite the lot-level exchange rate with the change.

Click **Reset Lot Rate**, located in the **Currency Rules** section of the **Rules** page, to erase all customized lot-level exchange rates and replace them with the event-level exchange rate set.

Suppliers' View of a Multi-Currency Event

When signing into your event, participants choose bidding currencies on the **Select Lots** page. They choose an overall event bidding currency, and can choose exceptions for specific lots.

Participants can use the following procedure for selecting currencies on the **Select Lots** page:

1. The participant chooses the event bidding currency.
2. The participant checks the lots they will participate in.
3. Participant can select lot-level exceptions to the event bidding currency.
4. The participant chooses **OK** and proceeds to the Bidding Console. Bidding proceeds on a lot by lot basis. Suppliers see all bidding in the currency they selected for each lot. All bids appear (by the participant or by

competitors) in the participant's bidding currency for that lot, no matter the currency the bid was placed in. Besides for extra steps on the **Select Lots** page, the multi–currency feature is invisible to suppliers.

Working with Currencies During a Running Event

When you observe your event through the event monitoring interface, the system displays prices to you in the event currency. The system automatically converts bids placed in the various bidding currencies into the event currency.

Viewing Original Currency Bids

You can view bid values in their original bidding currencies. To do this, choose **Actions** > **Toggle Bid Currency**. The system will then display monetary fields in both their original currencies and the event currency.

Exchange Rates

Participants' bids immediately convert into the event currency using exchange rates that you define for that event. Participants' bids are stored in the event currency.

Exchange rates used in reporting and analysis are defined separately from the exchange rates used in SAP Ariba Sourcing. This might cause fractional discrepancies suppliers' original bids and the values displayed in the reports. For example:

For an event, the Event Currency is USD; a supplier places a bid for 100 EUR. For that event, the event creator defined the exchange rate to be 1.24 USD = 1 EUR. The system converts the bid into the event currency and stores it: 80.64 USD.

In reporting and analysis, a user using a European locale views a report which contains data (in aggregate) from the event. Reporting and analysis happens to have a different USD / EUR exchange rate defined: 1.20 USD = 1 EUR. Reporting and analysis converts the bid amount back into Euros, and the reported amount is slightly different from the original bid: 96.76 EUR.

Setting User Preferences for Globalization

Properly configured user preferences are essential for globalized events. The language users see, date and number formatting, and the accuracy of the times presented to them depend on settings such as Locale and Time Zone.

Locale

Locale determines the language in which users see the interface text. It also determines the formatting of dates and numbers, which is not necessarily tied to language. For example, although English is the language of both the

United States and the United Kingdom, Americans write January 15th, 2005 as 01/15/2005, placing the month before the day, whereas citizens of the United Kingdom write 15/01/2005, placing the day before the month. For that reason there is a locale `English-United States` and a locale `English-United Kingdom`.

Time Zone

Your sourcing solution determines your time zone in two ways.

- When you sign in, the system sets its time zone to match your computer's clock. Make sure that your computer's clock is set correctly, otherwise the system may display incorrect times.
- Your time zone setting in your sourcing solution's preferences. The system uses this time zone information to determine the times to place in system generated emails.

The system tries to display the time that is most appropriate to the user; in email messages, it sets the times based on the time zone set in the user's preferences, and in the interface, it sets the times according to the user's computer's clock.

If a user is travels away from the time zone set in their preferences, this can cause confusion. For example, a user from the United Kingdom (with preferences configured as such) might receive an email notifying them that an auction will start at 12 noon (GMT). If he or she is travels to California (and changes their computer's clock), then when they log on, they will see the auction start time as 8 PM (PST). This is the intended behavior of the system, however, the system does not specify the time zone, which can cause confusion.

Related Information

Time Zone Handling [page 284]

Translating Fields in Events

Use this procedure to translate fields in events.

Prerequisites

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)

Members of the **Translator** group have access to translation features, such as the presence of the **Translations** link next to translatable data.

If you do not see the **Translations** link, ask your administrator to assign you to the **Translator** group.

Context

There are two ways to translate business data:

- Translate one field into all languages.
- Translate all fields into a single language.

Procedure

1. To enter translations for fields in an event, perform one of the following actions:
    - To translate one field into all the languages you have decided to support, click **Translations** next to the field and enter the translations. You do not have to enter translations for all available languages.
    - To translate all fields into a single language, go to the **Content** page of the event you want to translate and click **Actions** > **Translate**. Continue with step 2.
2. On the **Content Translation** page, the **Base Language** is shown on the left in read-only fields. You cannot modify the base language data from this page.

    The **Translation Language**, the language that you are entering translations for, is displayed on the right. Choose the translation language from the pull-down menu on the upper right. Enter new translations or modify existing translations in the editable fields on the right hand side. If you have already entered some translated data, it is displayed and you can edit it.
3. At any point while you are editing, you can save your work. When you click **Save**, you do not exit the page.
4. When you are finished entering translations, choose another **Translation Language**, or click **Done**.

Results

When localized users sign in, they are presented with translated data, if present. Otherwise, they see the base language data.

> ⓘ 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.

Related Information

About International Events [page 271]
Translating Textual Information [page 272]

Creating Multiple Currency Events

Use this procedure to allow participants to submit event bids in different currencies; this option is useful for events with participants from different locales who want to bid using their local currencies. In competitive events with multiple currencies, each participant views all bids (their own, and their competitors' bids) in the currency they select.

Prerequisites

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)

The event must be a standard-capacity event (not a large-capacity event). Participants in large-capacity events cannot select bidding currency and must submit bids in the currency selected by the event manager.

Context

You use multiple currency events to create larger markets, which give you the potential for greater savings.

When you set the event currency, your sourcing solution uses this currency in the following ways:

- The system stores all monetary values in this currency.
- The system displays all monetary values to the event creator and team in this currency.

Procedure

1. Set the event currency, also known as the base currency.
2. Set up the currencies that suppliers can use when placing bids. These are called bidding currencies.

Related Information

About International Events [page 271]
Using Multiple Currencies [page 273]
Configuring Event Currency [page 278]
Configuring Event Bidding Currencies [page 279]

Configuring Event Currency

Use this procedure to configure the currency of an event.

Prerequisites

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)

Context

When you set the **Event Currency**, your sourcing solution uses this currency in the following ways:

- The system stores all monetary values in this currency.
- The system displays all monetary values to the **Event Creator** and **Team** in this currency.

Procedure

1. Choose the currency from the **Currency** pull-down menu when you are creating an event.
2. If you want to set the **Event Currency** for an event that has already been created, choose **Actions** > **Edit Overview**.
3. Edit the **Currency** field.
4. Set up the currencies that suppliers can use when placing bids. These are called **Bidding Currencies**.

Related Information

About International Events [page 271]
Using Multiple Currencies [page 273]
Creating Multiple Currency Events [page 277]
Configuring Event Bidding Currencies [page 279]

Configuring Event Bidding Currencies

Use this procedure to configure event bidding currencies.

Prerequisites

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)

Your sourcing solution only allows you to choose certain currencies as **Event Currencies**. You can only use currencies supported by *Reporting and Analysis*.

The event must be a standard-capacity event (not a large-capacity event).

The rule **Allow participants to select bidding currency** must be set to **Yes** to allow participants to select bidding currencies. Participants can only select the currency for lots and line items.

Context

When you set the **Event Currency**, your sourcing solution uses this currency in the following ways:

- The system stores all monetary values in this currency.
- The system displays all monetary values to the **Event Creato**r and **Team** in this currency.

Procedure

1. The **Currency Rules** section expands to show additional options.
2. You must choose a set of **Currency Conversion Rates**. An administrator user must initially add these rates. If an administrator user has not performed the initial configuration, you cannot choose a conversion rate set, and cannot add or edit bidding currencies.
3. After choosing an exchange rate set, you can **Edit** and adjust the rates. You can remove exchange rate pairs from the event or from specific lines within the event, but you cannot set up new exchange rate pairs that do not exist in the exchange rate set. If you need a currency pair that is not part of an existing exchange rate set, ask an administrator user to create it.
4. Choose a setting for **Show currency exchange rates to participants**. Setting the rule to **Yes** causes the **Currency Conversion Rates** table to appear on participant users' **Event Details** page.

   > ⓘ Note
   >
   > You use the **View as Participant** feature to view the rates as participants see them:

   a. Go to the **Content** page of the event wizard.

b. Click ▶ **Actions** ▶ **View as Participant** ▶.

c. In the preview, click the **Event Details** link, in the upper left. Note the **Exchange Rates** table.

5. On the **Content** page, you have the ability to customize the available currencies and exchange rates for each lot or line item that you create.

Related Information

About International Events [page 271]
Using Multiple Currencies [page 273]
Creating Multiple Currency Events [page 277]
Configuring Event Currency [page 278]

Reviewing and Publishing Events

About Reviewing and Publishing Events

When you go to the **Summary** page, your event is auotmatically checked for errors. If errors are found, you must fix them before you can publish the event. Publishing an event exposes it to participants. Whether or not the event has a preview period, accepts prebids, or immediately opens for bidding depends on how you configured the event's timing rules.

Clicks the **Summary** tab on the **Event** page.. If there are any errors, they appear in a gray box at the top of the **Summary** page. You cannot publish the event until the errors are fixed.

If there are errors, return to the appropriate rule or content to fix errors and then come back to the **Summary** page. You might encounter event limits when you attempt to publish an event.

Below the **Overview** section, there are also sections for reviewing the event settings for:

- Timing rules
- Invited Participants
- Bidding Rules
- Content
- Currency Rules
- Customized Messages
- Market Feedback

Review each section to make sure the settings are as you expect. In addition there are certain settings you can change from the **Edit Overview** page. Choose **Actions** > **Edit Overview** to edit the overview.

All the editable settings are described earlier except the access controls for the event as a whole.

Related Information

[Event Content Limits [page 26]]
[Publishing Events [page 285]]
[Tracking the Status of Event Publish Approval Tasks [page 287]]
[Approving Event Publish Approval Tasks [page 288]]
[Scheduling Event Start Times [page 290]]
[Manually Publishing Scheduled Events [page 291]]
[Changing Events to Test Events [page 293]]

Project Access Control

Click the link to the right of **Access Control** to set access to the project.

Access Control	Limits Access To...	Sourcing Role
Classified	Members of the groups Classified Access, Contract Manager, Sourcing Manager, and Procurement Manager can view the object.	Yes
Draft Access Restricted	Only the Owner can access the document when its status is Draft. Once it is published, this restriction no longer applies.	Yes
Finance Information	Members of the Finance group can view the object.	Yes
Legal Information	Members of the Legal group can view the object.	Yes
Owner Only	Sourcing event project owners can view the object. These are users in the Project Owner project group.	Yes
Private to Content Only Reports Users	Users with access to content-only reports can view this project.	No
Private to Global Catalog Reports Users	Users with access to global catalog reports can view this project.	No
Private to Internal Users	Internal users of sourcing solutions from SAP Ariba can view the object.	Yes
Private to Spend Visibility Opportunity Analysts	Spend Visibility Basic users can view the object.	No
Private to SPM Users	Supplier Performance Management users can view this project.	No
Private to Team Members	Only team members listed on the Team page can view the object.	Yes

Project Description

By default, the project description is only available to team members and hidden from participants.

Printing Event Information

On the **Actions** menu, the **Print Event Information** action exports the event information to a file in Microsoft Word's DOC file format. You will also see this action in the event monitoring interface. This function enables you to print the following event information:

- Overview
- Team members
- Timing rules
- Message board rules
- Market feedback rules
- Invited participants
- Auction Format
- Customized messages
- Bidding rules
- Event content
- Currency rules
- Scoring
- Project owner actions

Suppliers can only see and print the **Overview**, **Timing Rules**, and **Market Feedback** information allowed by the event.

Once the event is in Microsoft Word or HTML, you can format it as you like it and print it. There are no differences between the output formats other than how they are formatted and how you can edit and display them. The choice is personal preference.

SAP Ariba Start Sourcing SAP Business Network Discovery Posting Requirements

SAP Ariba Start Sourcing users must create a **Supplier Discovery Posting** before they can publish an RFP, RFI, or reverse auction. **Supplier Discovery Posting** requirements in SAP Ariba Start Sourcing do not apply to test events. If users attempt to publish an RFP, RFI, or reverse auction in SAP Ariba Start Sourcing without first creating a **Supplier Discovery Posting**, SAP Ariba Start Sourcing displays an error message and link to the **Supplier Discovery Posting** section on the **Supplier** page.

Time Zone Handling

The United States and the European Union observe Daylight Savings Time on different dates. Be aware of when Daylight Savings Time starts and stops and make sure you take the change into account.

All times are stored in Coordinated Universal Time (UTC) format. When times are displayed to a user who is signed in, they are adjusted to reflect the user's local time based on their profile settings. Every time setting in a profile has a certain adjustment from UTC, either adding time or subtracting time. One exception is the "Local Time" setting. That means use the computer's time setting and the adjustment is derived from that.

Even in notification emails, times or dates are converted to the recipient's time zone as specified in their profile.

If you have an event scheduled to start at 8:00 AM, Eastern Standard Time, it is stored in the system as 1:00 PM UTC (Greenwich Mean Time). When displayed to a user, whether a buyer or a supplier, it is converted to their profile setting, so a supplier in France, for example, sees an event start time of 2:00 PM.

When Daylight Savings time occurs in your time zone, the adjustment from UTC changes to accommodate it. Essentially your local time is changing to a different time zone. If you set up an event to start at 8:00 AM next week, and by next week the start or end of Daylight Savings Time will put you in a different time zone, the system is aware of that change and sets the start time to the correct UTC for that date. That way when Daylight Savings Time occurs, nothing has to change.

Publishing Events

This procedure describes how to publish events.

Prerequisites

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)

> ⚠ Restriction
>
> If you are a member of a group that does not have permission to publish an event, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

When you go to the **Summary** page of the event creation wizard, it checks for errors. After they are fixed, you can publish the event.

Procedure

1. Click **Summary** in the event creation wizard on the left to navigate to the **Summary** page.
2. Fix errors as needed.
3. Click **Publish** or **Submit**.

   If your event has an **Approval For Publish** task, your event shows a **Submit** button instead of a **Publish**. You submit your event for approval; when it's approved, it's automatically published.

Results

Publishing the event sends event invitations to the participants. If the event has the **Enable document URL terms** rule enabled and your site has implemented the `DocumentURLOutBound` and `DocumentStatusChangeNotification` web services, the web services will retrieve URLs that participants can click to retrieve documents from your site. You can check the banner (top) area of the contents page to view the status of the URL retrieval. If SAP Ariba cannot retrieve all URLs, SAP Ariba displays a warning but allows the event to be published. and check the status (**Info** field) displayed for each document URL in the event **Content** or **Summary** area.

After the event is published, you can:

- Monitor the event.
- Return to the Home dashboard.
- Publish the event to the SAP Business Network Discovery. This option only appears if your system is configured to talk to SAP Business Network Discovery. Events published on SAP Business Network Discovery are called postings.

Related Information

About Reviewing and Publishing Events [page 282]
Tracking the Status of Event Publish Approval Tasks [page 287]
Approving Event Publish Approval Tasks [page 288]
Changing Events to Test Events [page 293]
Creating Postings on SAP Business Network Discovery [page 255]
Editing and Monitoring Events [page 421]

Tracking the Status of Event Publish Approval Tasks

Use this procedure to track the status of event publish approval tasks.

Prerequisites

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)

> **Restriction**
>
> If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

Buyers who must submit their event for publish approval can track whether or not their event is approved, and see which people are responsible for approving the event.

Procedure

1. After you click **Submit**, the **Event Submitted for Approval** page displays. Click **View details** to access the event monitoring interface. The event now has a status of **Pending Publish Approval**.
2. Choose **Actions** > **View Publish Approval Task**.

   The **Approval Task** page displays. Here you can track the approval process of your event. For example, to see who has the authority to approve your event, view the members of the Sourcing Approver group.
3. Click **Sourcing Approver**. On the **Review Details for Sourcing Approver** page, view the Members field to see who has the ability to approve your event for publishing.

Results

Publishing the event sends event invitations to the participants.

Next Steps

Track the approval process of your event.

Related Information

About Reviewing and Publishing Events [page 282]
Approving Event Publish Approval Tasks [page 288]

Approving Event Publish Approval Tasks

Use this procedure to approve event publish approval tasks.

Prerequisites

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)

> ⚠ Restriction
>
> If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

Sourcing Approvers have the responsibility to approve the event, allowing it to be published.

Procedure

1. When a user has submitted an event for you to approve, a link appears on the **Home** dashboard in the **Needs Review** content item.
2. Click the link in the **Needs Review** content item.

   The **Document Approval Task** page displays.
3. Click **Approve** or **Deny**.
4. On the **Approved** page or **Denied** page, you can write a message and add an attachment to communicate why you approved or denied the event.
5. Click **OK** when you are finished composing your message.

Results

The event immediately publishes after your reviewers have approved it.

Users with edit permission for the event can choose to open a published event for editing. In addition, the user can then select **Revert Draft** to discard any changes. If this occurs and the Retain Approval for Publish task status after Revert Draft parameter is set to **Yes**, the **Approved** status for the **Approval for Publish** task is retained. If this parameter is set to **No** (the default value), the status for the **Approval for Publish** task is set to **Cancelled**.

Next Steps

After you approve an event publish approval task, you can:

- Monitor the event.
- Return to the **Home** dashboard.

Related Information

About Reviewing and Publishing Events [page 282]
Tracking the Status of Event Publish Approval Tasks [page 287]
Editing and Monitoring Events [page 421]

Scheduling Event Start Times

Use this procedure to schedule event start times.

Prerequisites

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)

> ⚠ Restriction
>
> If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

The scheduled events functionality enables you to configure the exact date and time that your event or survey will publish. For example, if you build an event that requires approval, but you do not want the event to publish immediately after it has been approved, you can schedule the event to publish on a specific date and time in the future. Scheduled events functionality can also be helpful if you are going to be on vacation or out of the office and you want to publish the event the morning you return.

You always have the ability to publish a scheduled event prior to its scheduled start time with a single click.

Procedure

1. Choose **Schedule For the Future** for **Start time** in the **Timing Rules** section.
2. Enter the date and time you want your sourcing solution to publish the event.

3. After you have configured your event, click **Schedule** on the **Event Summary** page.

Results

After your event has been scheduled, the time remaining until the event is published is displayed in the event monitoring interface. Publishing the event sends event invitations to the participants.

Next Steps

If you have permission, you can extend or reduce the time remaining until the event is published. For an RFI, RFP, or when an Auction is in a preview state, you extend or reduce the timing in the **Actions** menu by choosing the **Reduce Timing** or **Extend Timing** options in the event monitoring interface.

Related Information

About Reviewing and Publishing Events [page 282]
Manually Publishing Scheduled Events [page 291]

Manually Publishing Scheduled Events

Use this procedure to manually publish scheduled events.

Prerequisites

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)

> ⚠ Restriction
>
> If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

You always have the ability to publish a scheduled event prior to its scheduled start time in the event monitoring interface.

Procedure

1. Choose **Publish Now** from the **Actions** menu in the event monitoring interface.

   SAP Ariba Sourcing displays a publish event confirmation dialog box.
2. Click **OK**.

Results

Publishing the event sends event invitations to the participants.

Next Steps

After you publish your event, you can:

- Monitor the event.
- Return to the Home dashboard.
- Publish the event to the SAP Business Network Discovery. This option only appears if your system is configured to talk to SAP Business Network Discovery. Events published on SAP Business Network Discovery are called postings.

Related Information

About Reviewing and Publishing Events [page 282]
Scheduling Event Start Times [page 290]

Editing and Monitoring Events [page 421]
Creating Postings on SAP Business Network Discovery [page 255]

Changing Events to Test Events

Use this procedure to change events to test events.

Prerequisites

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)

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.

> ⚠ Restriction
>
> If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button, and you see a highlighted message.

Context

You can exclude test projects from reporting by filtering them out, but note that the system sends email notifications as if they were normal events. Be careful not to inadvertently send misleading email to participants or team members. If an event is not completed, you can change it to a test event.

Test projects are not shown in the **Sourcing Projects** tile.

Procedure

1. Choose ▸ **Actions** ▸ **Edit** ▸.
2. Click **Summary** on the left side of the page.
3. Find the **Overview** section of the **Summary** page. Choose ▸ **Actions** ▸ **Edit Overview** ▸.
4. Change the **Test Project** field to **Yes**. Click **OK**.
5. Click **Update** on the **Summary** page, then choose ▸ **Actions** ▸ **Delete** ▸.

Related Information

About Reviewing and Publishing Events [page 282]
Publishing Events [page 285]

Working with Automatic Event Notifications

About Automatic Event Notifications

SAP Ariba Sourcing automatically generates notifications to inform users about the state of an event. Depending on the situation, SAP Ariba Sourcing sends notifications as instant messages, emails, or both.

SAP Ariba Sourcing also lists notifications on the **Log** tab, to serve as a record of your event. For example:

- When you publish an event, the system automatically sends invitation email to invited participants. The system does not send instant messages, since generally your participants are not signed in to the system at that time. The system generates different emails depending on whether or not a participant has used the system before. The system also logs this action to the **Log** tab.
- If you cancel an event while in progress, the system automatically sends participants both an instant message and an email, since they are probably signed in at that time. The system also logs this action to the **Log** tab.

Notification content is determined by templates, which can be customized by users with the appropriate capabilities.

Notifications for Sourcing Requests and Projects Created Using the RFQ and Award Integration with SAP Ariba Sourcing Feature

SAP Ariba Sourcing sends notifications for sourcing requests and projects created from integration with an ERP. These notifications are sent by email only and are also listed in the **Log** tab. The content of these notifications is fixed and cannot be modified (these notifications do not use templates). For additional information, see Notifications for Sourcing Requests and Projects Created from an ERP Integration [page 559].

Notify Active Team Members When Event Duration Changes or Event Reopens

When set to **Yes**, SAP Ariba Sourcing sends notifications to active team members in addition to event participants when the event duration changes (extended or reduced) or when the event is reopened. These notifications are sent by email only and are also listed in the **Log** tab. For additional information, see Notify Active Team Members When Event Duration Changes or Event Reopens [page 576].

Related Information

Editing Site-Wide Event Messaging Templates [page 297]
Editing Event and User-Level Messaging Templates [page 298]
Stopping Automatic Event Notifications [page 299]
Configuring Event Reminder Messages [page 300]

Automatic Event Notification Example

Suppose an owner cancels an in-progress event. SAP Ariba Sourcing notifies participants by automatically sending an instant message, an email, or both, as appropriate. SAP Ariba Sourcing archives notifications in the **Message Center** or **My Messages** page for a specific event, and in the **Notifications** page, which stores all notifications for a specific user. If a user is participating in more than one event, a notification from another event can interrupt a second event.

Automatic Event Notification Templates

Notification content is determined by a template. You can modify the templates for a single user in an event, for all users in an event, and for all events. The templates use special capitalized variables enclosed by brackets to insert contextual information into the notifications. An example of a messaging template:

Subject:

```
Event [EVENT_TITLE] is cancelled.
```

Content:

```
On [CANCELLATION_TIME_AND_DATE], the [SPONSOR_CORPORATE_NAME] Event [CBE_NUMBER]
[EVENT_TITLE] was cancelled. The event is no longer available.

If you have questions, please contact [SPONSOR_BUYER_NAME] at [SPONSOR_PHONE] or via
e-mail at [SPONSOR_EMAIL].

Thank you,

[SPONSOR_CORPORATE_NAME]
```

The capitalized phrases contained in brackets, for example `[EVENT_TITLE]`, are variables that the system replaces with information specific to the event when generating a notification. For example, in the following sentence from a messaging template “Event `[EVENT_TITLE]` has been extended by `[TIME]`” the system replaces the bracketed phrases with specific information: “Event RFP 3 GHz laptops has been extended by 30 minutes.”

You can edit the template to alter the generated notifications. As you edit the text, add or remove the bracketed, capitalized variables, but be sure not to change them, or the system cannot recognize them and will not substitute the desired values.

Event Reminder Messages

Event participants who have not submitted a response do not always know when an event is ending and getting internal users to respond to surveys about suppliers can be difficult. You can use the event reminder message feature to configure when and how often reminder email notifications and online messages are sent to event participants and internal users. Event reminder messages remind event participants about the state of an event and remind internal users to respond to surveys.

SAP Ariba checks if participants are registered when sending out event reminder emails. If the participant is not registered, SAP Ariba sends the event reminder notification for participants who have not used SAP Ariba before.

You can configure the following values on the **Edit Reminder** page:

- **Start reminders**: Specifies when the first reminder will be sent. If you enter zero in this field, no start reminders will be sent, even when an interval is selected and a value is entered in the **Send last reminder** field. If this is the only event reminder message field you specify, then only the event start reminder message will be sent.
- **Send reminders every**: Specifies the frequency that reminder messages will be sent. The frequency for **Send reminders every** and **Start reminders** must be greater than zero. If you do not enter a value in this field, then only one start reminder or one last reminder message will be sent.
- **Send last reminder**: Specifies when the last reminder will be sent. The value for the **Send last reminder** field must be greater than zero. If you enter a value in the **Send last reminder** field and do not enter a value in the **Start reminders** field, then only the event end reminder message will be sent.

Editing Site-Wide Event Messaging Templates

Use this procedure to edit site-wide event messaging templates.

Prerequisites

Users must be a member of the **Customer Administrator** group to edit site-wide event notification templates.

> ⚠ Restriction
>
> Notification content is determined by a template. You can modify the templates for a single user in an event, for all users in an event, and for all events. The templates use special capitalized variables enclosed by brackets to insert contextual information into the notifications.

Context

Administrators can customize notifications for all events that take place in SAP Ariba Sourcing. The notifications that the system sends on your behalf appear to participants as communication directly from your business to theirs. Edit these templates to ensure they give the correct impression of your business.

Procedure

1. On the dashboard, click **Manage** > **Administration**.
2. Choose **Event Manager** > **Messaging Templates**.
3. Select the template you want to edit and click **Edit**.
4. Change the text and rearrange any bracketed phrases.
5. Click **Save**.

Related Information

About Automatic Event Notifications [page 295]
Automatic Event Notification Templates [page 296]
Event Notification Template Variables [page 302]
Automatic Event Notification Addressing [page 313]
Editing Event and User-Level Messaging Templates [page 298]

Editing Event and User-Level Messaging Templates

Use this procedure to edit event and user-level messaging templates.

Prerequisites

Users must be a member of the **Sourcing Agent** group to edit event and user-level event notification templates.

> **Restriction**
>
> Notification content is determined by a template. You can modify the templates for a single user in an event, for all users in an event, and for all events. The templates use special capitalized variables enclosed by brackets to insert contextual information into the notifications.

Context

You can customize notifications for a specific event, and for a specific participant in the event. For example, if you are an owner who wants to deviate from the site-wide templates for a single event, you can do that. Or, if you know that a certain participant is particularly inexperienced, you can edit their message templates to make the information more detailed.

Be sure to choose the **Apply Template to** setting before editing the template. Changing this field causes any edits you make to be lost.

You can also choose to disable and enable notifications for specific events.

Procedure

1. While editing or creating an event, go to the **Summary** page.
2. Choose **Actions** > **Customize Messages**.
3. Choose the message you want to customize, and click **Customize**.
4. To customize the template for all participants in the event, leave **Apply Template** to at its default setting of **All participants**. To customize the template at user-level, choose that user's name. An asterisk next to a user's name indicates that their template is already customized.
5. Optionally, you can click **Enable / Disable** to enable or disable a message for the event.

   The **Status** column indicates whether a message template is enabled or disabled.

Related Information

About Automatic Event Notifications [page 295]
Automatic Event Notification Templates [page 296]
Event Notification Template Variables [page 302]
Automatic Event Notification Addressing [page 313]
Editing Site-Wide Event Messaging Templates [page 297]

Stopping Automatic Event Notifications

Use this procedure to stop automatic event notifications.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

⚠ Restriction

Notification content is determined by a template. You can modify the templates for a single user in an event, for all users in an event, and for all events. The templates use special capitalized variables enclosed by brackets to insert contextual information into the notifications.

Context

You can turn off some automatic notifications by editing your preferences on the Home dashboard.

Most of the notifications that you can turn on and off are related to sourcing process management functionality, which your organization might not have as it is licensed separately from event management functionality. However, some notifications are related to event management functionality, for example, the notifications related to the approval of an event for publishing.

Procedure

1. In the upper-right corner of the dashboard, click your name and select **Preferences** > **Change notification preferences**.
2. Click **Change notification preferences**.

   The **Email Notification Preferences** page opens.
3. Change the settings on this page to determine which types of email notifications you receive. Notifications that concern Event Management functionality are related to approval tasks.

Configuring Event Reminder Messages

Use this procedure to configure event reminder messages.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

⚠ Restriction

You cannot customize the event level email template from the **Edit Reminder for prebid**, **Edit Reminder for Response start date**, or **Edit Reminder for Due date** screens. If you want to customize email messages for each participant, you have to edit the email templates on the **Edit Templates** page, which you can access from the **Rules** page or **Summary** page.

Notification content is determined by a template. You can modify the templates for a single user in an event, for all users in an event, and for all events. The templates use special capitalized variables enclosed by brackets to insert contextual information into the notifications.

Context

You can configure event reminder messages in templates and events for prebid end time, bidding start time, and due date. The content of event reminder messages is determined by an email template. You can modify the email templates for a single user in an event, for all users in an event, and for all events.

Procedure

1. In the **Timing Rules** section on the **Rules** page, click the **Reminder** check box or click **Edit**.

   The **Edit Reminder** screen appears.
2. Enter a value and select a time interval for each of the reminders you want to create. If you do not want to set a specific reminder, enter zero in the field.
3. Click **Enabled** in the **Edit Reminder** dialog box or click the check box next to **Reminder** on the **Rules** page to enable reminder messages.
4. Click **OK**.

Next Steps

You can click **Edit** to make changes to the reminders after they have been created.

Related Information

About Automatic Event Notifications [page 295]
Event Reminder Messages [page 297]

Event Notification Template Variables

The following variables are available for use in event notification messages.

Variable	Description
BID_ERROR_CODE	This is a brief phrase that explains why a bid was rejected.
BID_ID	This is the ID of the bid to which this notification refers.
BIDDING_FORMAT	This is the name of the template that was used to create this event.
CANCELLATION_TIME_AND_DATE	This is the time and date that the event was canceled. The value of this variable is null until the event is cancelled. All dates and times are set to the time zone in the recipients profile.
CUSTOM_MESSAGE	This is your personalized message that SAP Ariba Sourcing includes in the Event Edited and Republished notification sent to event participants.
DENY_TO_RESPOND_URL	This is the URL to which suppliers are directed if they do not want to respond to the event.
EVENT_END_DATE	The is the date on which the event is scheduled to end. All dates and times are set to the time zone in the recipients profile.
EVENT_START_DATE	This is the date on which the event is scheduled to start. All dates and times are set to the time zone in the recipients profile.
EVENT_START_TIME	This is the time at which the event is scheduled to start. All dates and times are set to the time zone in the recipients profile.
EVENT_TITLE	This is the name of the event specified by the project owner.
EVENT_TYPE	The possible event types are RFI, RFP, Auction, and Forward Auction.
EXTEND_REDUCE	This is the word “extended” or “reduced” and is used when the bidding period or event is made to last for a longer or shorter period of time.
ITEM_NAME	This is the name of the lot or item to which the notification refers., for example, if the bidding is extended, or the lot is awarded.
ITEM_NUMBER	This is the content number of the items.
MESSAGE_ID	This is the ID for the message.
MSG_URL	This is the URL for the message.
NEGOTIATION_CONTENT	This is the message that you entered using the supplier negotiation feature.
PARTICIPANT_FULL_NAME	This is the full name of the participant to whom this notification is sent or refers.
PARTICIPANT_USER_NAME	This is the user ID of the participant to whom this notification is sent. or refers.
PASSWORD_URL	This is the URL to which new suppliers are directed to sign in for the first time. they need to set a new password to continue.
PREBID_END_TIME	This is the time at which the prebid period is scheduled to end. All dates and times are set to the time zone in the recipient’s profile.
PREREQUISITE_REVIEW_STATUS	This is the status of the prerequisite.
PROJECT_ID	This is the project ID of this event.
REASON_TO_DECLINE	This is the reason the participant gave for declining to participate.

Variable	Description
RECIPIENT_EMAIL_ADDRESS	This is the email address to which the notification was originally sent.
RECIPIENT_NAME	This is the full name of the recipient to whom the notification was originally sent.
RESPONSE_TEAM_MEMBERS	This is the list of participants who are on the response team.
SCENARIO_TITLE	This is the title of the optimization scenario.
SENDER_NAME	This is the full name of the person sending the notification.
SENDER_ORGANIZATION_NAME	This is the name of the organization that is sending the notification.
SITE_URL	This is the URL of the site where you sign in to an event.
SPONSOR_BUYER_ NAME	This is the name of the person who is publishing the event.
SPONSOR_CORPORATE_NAME	This is the name of the company that is publishing the event.
SPONSOR_EMAIL	This is the email address of the person who is publishing the event.
SPONSOR_PHONE	This is the phone number of the person who is publishing the event.
SR_ID	This is the ID of the sourcing request.
SR_NAME	This is the name of the sourcing request.
SR_URL	This is the URL for the sourcing request.
SUBJECT	This is the subject line of the notification.
SYSTEM_CORPORATE_NAME	This is the name of the company defined in the SAP Ariba System that originates this notification.
TIME	This is an amount of time used, for example, when a bidding period is extended or reduced.
WEBJUMPER_ACTION_LINK	This is the URL to access the event in system.

Template Variables Available in Notification Types

The following table lists the variables available for each event notification type.

Notification Type	Variable
Awarding; announcement to participant who has been awarded	Event Title (EVENT_TITLE)
	Item Name (ITEM_NAME)
	Project Id (PROJECT_ID)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)

Notification Type	Variable
	Event Type (EVENT_TYPE)
Bid is Rejected	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Event Title (EVENT_TITLE)
	Site Url (SITE_URL)
	Bid Id (BID_ID)
	Bid Error Code (BID_ERROR_CODE)
	Bidding Format (BIDDING_FORMAT)
	Project Id (PROJECT_ID)
Bid is deleted	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Event Title (EVENT_TITLE)
	Site Url (SITE_URL)
	Bid Id (BID_ID)
	Bidding Format (BIDDING_FORMAT)
Bidding ends; event moves to 'Pending Selection' state	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Event Title (EVENT_TITLE)
	Site Url (SITE_URL)
	Project Id (PROJECT_ID)
Envelope declined	Item Name (ITEM_NAME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
Envelope opened	Item Name (ITEM_NAME)

Notification Type	Variable
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
Event cancelled	Cancellation Time and Date (CANCELLATION_TIME_AND_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event closing time extended/reduced	Event Start Time (EVENT_START_TIME)
	Event End Date (EVENT_END_DATE)
	Extend Reduce (EXTEND_REDUCE)
	Time (TIME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event edited and republished	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)

Notification Type	Variable
	Event Type (EVENT_TYPE)
Event end date reminder	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event end date reminder for participants who have not used SAP Ariba before	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
	Password Url (PASSWORD_URL)
	Time (TIME)
Event moves to open state	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
Event paused	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)

Notification Type	Variable
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
Event prebid closing time extended/reduced	Event Start Time (EVENT_START_TIME)
	Event End Date (EVENT_END_DATE)
	Extend Reduce (EXTEND_REDUCE)
	Prebid End Time (PREBID_END_TIME)
	Time (TIME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event reopened	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event resumed	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event start time reminder	Event Start Date (EVENT_START_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)

Notification Type	Variable
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Event start time reminder for participants who have not used SAP Ariba before	Event Start Date (EVENT_START_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
	Password Url (PASSWORD_URL)
	Time (TIME)
Excel Bid is accepted	Bid Id (BID_ID)
	Participant Full Name (PARTICIPANT_FULL_NAME)
	Participant User Name (PARTICIPANT_USER_NAME)
	Bidding Format (BIDDING_FORMAT)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Invitation for participants who have not used SAP Ariba before	Participant User Name (PARTICIPANT_USER_NAME)
	Participant Full Name (PARTICIPANT_FULL_NAME)
	Event End Date (EVENT_END_DATE)
	Time (TIME)
	Password Url (PASSWORD_URL)

Notification Type	Variable
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Large-capacity event: Event bid sheet generation is complete	Bidding Format (BIDDING_FORMAT)
	Clickable Access Link (WEBJUMPER_ACTION_LINK)
	Event Start Date (EVENT_START_DATE)
	Event Title (EVENT_TITLE)
	Event Type (EVENT_TYPE)
	Prebid end time (PREBID_END_TIME)
	Project Id (PROJECT_ID)
	Recipient Email Address (RECIPIENT_EMAIL_ADDRESS)
	Recipient Name (RECIPIENT_NAME)
	Sender Name (SENDER_NAME)
	Sender Organization (SENDER_ORGANIZATION_NAME)
	Site Url (SITE_URL)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	System Corporate Name (SYSTEM_CORPORATE_NAME)
Large-capacity event: Excel bid is accepted	Bidding Format (BIDDING_FORMAT)
	Clickable Access Link (WEBJUMPER_ACTION_LINK)
	Event Start Date (EVENT_START_DATE)
	Event Title (EVENT_TITLE)
	Event Type (EVENT_TYPE)
	Prebid end time (PREBID_END_TIME)
	Project Id (PROJECT_ID)

Notification Type	Variable
	Recipient Email Address (RECIPIENT_EMAIL_ADDRESS)
	Recipient Name (RECIPIENT_NAME)
	Sender Name (SENDER_NAME)
	Sender Organization (SENDER_ORGANIZATION_NAME)
	Site Url (SITE_URL)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	System Corporate Name (SYSTEM_CORPORATE_NAME)
Large-capacity event: Excel bid is rejected	Bidding Format (BIDDING_FORMAT)
	Clickable Access Link (WEBJUMPER_ACTION_LINK)
	Event Start Date (EVENT_START_DATE)
	Event Type (EVENT_TYPE)
	Prebid end time (PREBID_END_TIME)
	Project Id (PROJECT_ID)
	Recipient Email Address (RECIPIENT_EMAIL_ADDRESS)
	Recipient Name (RECIPIENT_NAME)
	Sender Name (SENDER_NAME)
	Sender Organization (SENDER_ORGANIZATION_NAME)
	Site Url (SITE_URL)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	System Corporate Name (SYSTEM_CORPORATE_NAME)
Lock Participant	Participant User Name (PARTICIPANT_USER_NAME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)

Notification Type	Variable
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Lot closing time extended/reduced	Item Name (ITEM_NAME)
	Event Start Time (EVENT_START_TIME)
	Event End Date (EVENT_END_DATE)
	Extend Reduce (EXTEND_REDUCE)
	Time (TIME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Lot reopened	Item Name (ITEM_NAME)
	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Non-Awarding; announcement to participant who has not been awarded	Event Title (EVENT_TITLE)
	Item Name (ITEM_NAME)
	Project Id (PROJECT_ID)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)

Notification Type	Variable
	Site Url (SITE_URL)
	Event Type (EVENT_TYPE)
Prebid end time reminder	Prebid end time (PREBID_END_TIME)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Type (EVENT_TYPE)
Prebid end time reminder for participants who have not used SAP Ariba before	Prebid end time (PREBID_END_TIME)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
	Password Url (PASSWORD_URL)
	Time (TIME)
Publish Event; Invitation for participants	Participant User Name (PARTICIPANT_USER_NAME)
	Event Start Date (EVENT_START_DATE)
	Event End Date (EVENT_END_DATE)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Event Type (EVENT_TYPE)
Uninvite a participant	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)

Notification Type	Variable
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Type (EVENT_TYPE)
Unlock participant	Participant User Name (PARTICIPANT_USER_NAME)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Type (EVENT_TYPE)
Update prerequisite review status	Prerequisite Status
	Item number (ITEM_NUMBER)
	Participant User Name (PARTICIPANT_USER_NAME)
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	Sponsor Buyer Name (SPONSOR_BUYER_NAME)
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	Event Type (EVENT_TYPE)

Automatic Event Notification Addressing

SAP Ariba Sourcing addresses and sends automatic notifications according to pre-programmed rules. You can change their content, but you cannot stop the system from generating them, nor alter to whom the system sends them. Instant Messages are displayed on both the **Event Messages** and the **Notifications** pages.

> ⓘ Note
>
> Participants must maintain an accurate email address in their user profile. Participants whose email addresses are incorrect do not receive automatic notification emails from SAP Ariba Sourcing.

The following table details the notification trigger actions for buyers:

Trigger Action and Description	Notification Subject	Instant Message	Email
Publish event: Notification for team members.	Event [EVENT_TITLE] published by [SPONSOR_BUYER_NAME].		X
Invited supplier declines supplier agreement.	Event [EVENT_TITLE], [PARTICIPANT_USER_NAME] has declined the bidder agreement.		X
Supplier submits a bid.	Response in event [EVENT_TITLE] has been submitted.		X
Contents for a large-capacity event have been successfully processed and imported.	Action Required: SAP Ariba event [PROJECT_ID] [EVENT_TITLE] has been successfully imported.	X	X
An error occurred while processing the contents for a large-capacity event.	Action Required: SAP Ariba event [PROJECT_ID] [EVENT_TITLE] has encountered an error.	X	X
An event report for a large-capacity event was generated.	The [REPORT_NAME] generation in Event [PROJECT_ID] [EVENT_TITLE] is complete.	X	X
An error occurred while generating an event report for a large-capacity event.	The [REPORT_NAME] generation in Event [PROJECT_ID] [EVENT_TITLE] has encountered an error.	X	X

The following table details the notification trigger actions for suppliers:

Trigger Action and Description	Notification Text	Instant Message	Email
Awarding; announcement to supplier who has been awarded.	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been awarded.		X
Awarding; announcement to supplier who has not been awarded.	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been awarded.		X
Bid Collision; occurs when two bids are submitted simultaneously.	Bid (ID=[BID_ID]) in event [EVENT_TITLE] has been rejected by the system (Error=[BID_ERROR_CODE]).	X	
Bid deleted: Notification to let supplier know their bid has been deleted.	Your bid in event [EVENT_TITLE] has been deleted by [SPONSOR_BUYER_NAME]. See bid history for details (Reference Number=[BID_ID]).	X	X
Bid triggers overtime.	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been [EXTEND_REDUCE] due to a last minute bid (overtime).	X	
Event cancelled.	Event [EVENT_TITLE] is cancelled.	X	X
Event duration extended or reduced. Suppliers who have submitted a bid receive an email notification.	Event [EVENT_TITLE] has been [EXTEND_REDUCE] by [TIME].	X	X
Event moves to open state; bidding begins.	Event [EVENT_TITLE] is now accepting responses.	X	
Event moves to Pending Selection state; bidding ends.	Event [EVENT_TITLE] is no longer accepting responses.		X
Event paused.	Event [EVENT_TITLE] is now paused.	X	

Trigger Action and Description	Notification Text	Instant Message	Email
Event reopened.	All participants except action initiator.	X	
Event republished; occurs after you edit a running event. SAP Ariba Sourcing only sends the message when you choose to email suppliers.	Event [EVENT_TITLE] has changed.	X	X
Event resumed.	Event [EVENT_TITLE] is now resumed.	X	
Large-capacity event: Bid accepted.	Excel Bid (ID=[BID_ID]) in event [EVENT_TITLE] submitted by [PARTICIPANT_USER_NAME] has been accepted by the system.	X	X
Large-capacity event: Bid rejected because an error occurred during processing.	Response (ID=[BID_ID]) in event [EVENT_TITLE] has been rejected by the system (Error=[BID_ERROR_CODE]).	X	X
Large-capacity event: Bid sheet (contents) generated.	The excel bid sheet generation for Large Line Item Event [PROJECT_ID] [EVENT_TITLE] is complete.	X	X
Lock Supplier; owner removes a supplier's access privileges.	You have been locked out of the event [EVENT_TITLE].		X
Lot closing time extended.	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been [EXTEND_REDUCE] by [TIME].	X	
Lot reopened.	Event [EVENT_TITLE] Lot - [ITEM_NAME] has been reopened.	X	
Publish event: Notification for invited suppliers who have never participated in a SAP Ariba Sourcing event and must create a SAP Ariba Sourcing account before signing in.	You are invited to participate in event: [EVENT_TITLE].		X
Publish event: Notification for invited suppliers who have participated in SAP Ariba Sourcing events before.	You are invited to participate in event: [EVENT_TITLE].		X
Unlock Supplier; owner restores a supplier's access privileges.	Your access to the event [EVENT_TITLE] has been restored.		X
Remove supplier from event during runtime edit.	Your access to the event [EVENT_TITLE] has been revoked.		X

Awarding Events

About Awarding Events

Awards specify the quantity or amount of each item that you will source from awarded suppliers.

After bidding closes for an event, you can review responses and award items in the event to suppliers. This period referred to as the **Review responses** phase in guided sourcing and as the **Pending Selection** state in classic sourcing.

When awarding suppliers, you may want to select a single supplier for all lots, or you might want to mitigate risk and award the business to two or more suppliers. This can be a complex procedure for a large event with numerous lots and line items, and with multiple suppliers bidding for the business.

A high-level workflow for awarding events is:

1. You create one or more one or more **award scenarios** that specify the amount (quantity or percentage) of each item that you will source from awarded suppliers. Award scenarios enable you to select suppliers and try out possible amounts of items that you will source from each selected supplier, and to compare the outcomes of different scenarios before awarding items. You can award business to suppliers based on one or more scenarios; you may also choose to ignore or delete scenarios.

SAP Ariba Sourcing supports the following types of award scenarios:

- **Manual scenarios**. You manually select suppliers and enter item allocations on the award page.
  You can also use manual scenarios with spreadsheets. You export bid information to a spreadsheet, edit the spreadsheet to specify suppliers and allocations, then import the edited spreadsheet to the scenario.
- **Optimization scenarios**. With optimization scenarios, SAP Ariba Sourcing evaluates possible award allocations for you. An optimization scenario specifies a goal, such as minimizing the total cost. An optimization scenario can optionally include constraints, such as the minimum or maximum number of suppliers to award, and specify item groups or subsets of items to award. You then submit the scenario for evaluation, and SAP Ariba Sourcing determines the optimal suppliers and allocations for the scenario.
  SAP Ariba provides preconfigured optimization scenarios, such as the **Best Bid** scenario, which allocates 100% of each item to the supplier that submitted the lowest **Extended Price** for the item.

2. By default, a scenario must be awarded before you can award data to an external system. You can also send draft award scenario data to an external system if the **Send draft award scenarios to external ERP systems** parameter is set to **Yes**. For more information about this parameter, seeSend draft award scenarios to external ERP systems . For information about managing parameters, refer to Intelligent Configuration Manager Administration.
3. If your event does not have an **Approval for Award** task, you select a scenario and create an award from the scenario.
   If your event has an **Approval for Award** task, you submit a scenario for approval. When a scenario is approved, an award is created from the scenario.
4. After you submit an award for approval or create an award you can choose to send notifications to all suppliers or the awarded suppliers.
5. If your site is integrated with an external system, you can send award information to the external system. The external system can create a follow-on document, such as a purchase order or contract.
   You can send award data to an external system if any of these features are enabled for your site:
   - Award Scenario ERP Integration
   - Award Integration Using Material Master Item Data
   - RFQ and Award Integration with SAP Ariba Sourcing feature. In addition, the event must have been created from a sourcing request project from the integration.

   If your site is integrated with SAP Ariba Contracts, you can create a procurement contract workspace that contains the award information.
6. By default, the event automatically changes to the **Completed** state after at least one award is submitted for each item in the event.
   An administrator for your site can set the Automatically change event status to completed when all items are awarded parameter so that events do not automatically change to the the **Completed** state.

You can also use the following optional features when awarding events, if they are enabled:

- **Minimum Eligibility Criteria for Awards** (Supplier eligibility criteria for awards): If your solution includes SAP Ariba Supplier Lifecycle and Performance, event templates can include a setting that defines eligibility criteria for awarding events to suppliers on either an event or line-item bases, based on their status in the supplier management process. The least restrictive setting (**Not Registered**) includes all existing suppliers, while the most restrictive setting (**Qualified**) requires that suppliers be qualified in the event's commodities and regions in order to be eligible for awards. This setting is not editable in events, and you cannot award events or line items to suppliers who do not meet the minimum eligibility criteria specified in the template.

  > ⓘ Note
  >
  > If your site includes SAP Ariba Supplier Lifecycle and Performance and you use process projects for supplier qualification, refer to About Supplier Qualification and SAP Ariba Sourcing Events.

- **Bid analysis**: Bid analysis shows bid data both graphically and in table format. You can sort bid data and apply filters to reduce the suppliers and items that are shown. You can then create a manual scenario from the sorted and reduced set of items and suppliers. You can also apply bid analysis filters to preconfigured (out-of-the-box) optimization scenarios, then create manual scenarios based on the results. Bid analysis can also compare bids against historical values.
- **Grading and scoring**: (Only for guided sourcing events) You can set minimum grades required to award items and require consensus grades to be submitted for items to be awarded.

Real-Time Optimizations

Your site can be enabled for real-time optimizations through the `Application.AQS.RFX.AllowToOptimizeDuringBidding` site configuration parameter, as described in Site Configuration Options for Managing Events [page 561]. If real-time optimizations are enabled, the event **Scenario** tab is absent and scenario information is shown under the **Content** tab instead.

Related Information

Awarding Events Using Manual Scenarios [page 318]
Using Optimization Scenarios to Award Suppliers [page 323]
Awarding Events Using Event Optimization Scenarios [page 333]
Awarding Single Items or Lots to Multiple Suppliers in a Manual Scenario [page 321]
Viewing Event Award Approval Tasks [page 341]
Approving Events for Award [page 342]
Exporting Event Draft Contracts to Your Local Desktop [page 344]
Exporting Event Draft Contracts to External Systems [page 345]
Creating New Contracts from Awarded Events [page 347]
Adding Awarded Events to Existing Contracts [page 348]
Bid Analysis [page 351]
Creating Event Scenarios Reports [page 457]

Awarding Events Using Manual Scenarios

Use this procedure to award events using manual scenarios.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The manual scenario allows you to award specific lots to individual suppliers, and split the awarding of a lot by percentage among multiple suppliers. This scenario is useful if your awarding decision is fairly obvious. For large and complex events where the awarding is not easy to determine, use an optimization scenario.

> → 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. Complete one of the following actions to open a page for a manual scenario:
   - From the **Scenario** tab, choose **Create** > **Manual Scenario**.
   - If real-time optimizations are enabled for your site, go to the **Content** tab. Expand the **Scenarios** area near the top of the page. Choose **Create** > **Manual Scenario** from the scenarios table.
   - From the **Award** tab, click **Award**
2. Enter a name for your scenario in the **Name** field.
3. If you are using the RFQ and Award Integration with SAP Ariba Sourcing feature and you created your event from a sourcing request project, complete the following steps:
   a. Select a value from the **Document Type** pull-down menu.
   This value indicates the type of document you want to create in your ERP system after it receives award information from SAP Ariba Sourcing. You can choose either **Purchase Order**, **Contract**, or **Scheduling Agreement**.
   b. Select a value from the **Document Category** pull-down menu.
   This value indicates the category of the document you want to create in your ERP system. If you are integrated with an SAP ERP, you can choose:
      - **NB Standard Purchase Order**, **WK Value Contract**, or **MK Quantity Contract**.
      - **LP Scheduling Agr. w/o release doc.** or **LPA Scheduling Agr. with release doc.** for **Scheduling Agreement** document type.

   If you are integrated with an Oracle ERP and selected **Contract** for the **Document Type**, Oracle creates a blanket purchase agreement (value contract) regardless of the document category.
4. Select the participant to whom you are awarding the items.

- If there are pull-down menus for the items and lots, click the menu for each item or lot and select the participant to whom you are awarding the item. To award an item or lot to multiple participants, select **Advanced Award**. A window to split the award opens to specify the percentage or quantity to award for each participant. For greater accuracy in computation, you can specify a value with decimal places for the split award.
- If there are no pull-down menus for the items and lots, this is a large-capacity event.
  - Click **Excel Import**.
    The **Import Scenario from Excel** page opens.
  - Click the **Click here to open your Scenario in an Excel Spreadsheet** link.
  - Save the content to your computer.
  - Edit the spreadsheet in Microsoft Excel.
    Review the instructional worksheets and note the background colors that indicate which cells are required, optional, or read-only.
    Open the **Award Allocation** worksheet. By default, there is one row per line item; if you want to split allocations, copy rows as needed. For each row, enter the supplier name for the allocation in the **Organization** column. Specify a percentage for the allocation (such as `100%`) in the **Allocation** column, or the number of units in the **Quantity Allocation** column.
  - Save the edited Excel spreadsheet to your computer.
  - Return to the **Import Scenario from Excel** page. Click **Browse** and locate your edited Excel spreadsheet.
  - Click **Upload**.

5. View the prices and savings for this scenario on the **Summary** tab.
6. You can click **Save As** to save a copy of the scenario you are working on.
7. Click **Done** to save and exit the scenario. The scenario is listed on the **Scenario** tab. You can update the scenario and submit it when you are ready.
8. When you are finished with the scenario, click **Submit for award**.
9. **Optional:** Send the award data to the external system.

   If you are using the RFQ and Award Integration with SAP Ariba Sourcing feature, and you created your event from a sourcing request project, or you are using the Award Integration Using Material Master Item Data feature and want to send award data to the external system, complete this step.

   > ⓘ Note
   >
   > By default, a scenario must be awarded before you can award data to an external system. You can also send draft award scenario data to an external system if the **Send draft award scenarios to external ERP systems** parameter is set to **Yes**. For more information about this parameter, seeSend draft award scenarios to external ERP systems . For information about managing parameters, refer to Intelligent Configuration Manager Administration.

   a. Choose **Actions** > **Send Quotes to External System** to send the award information to the external system.

      The event owner invites suppliers manually. However, if you do not have an active relationship with the awarded suppliers on SAP Business Network, or if the suppliers do not have a valid Vendor Key, then the award information cannot be sent to the external system. For more details, see Enabling Suppliers on SAP Business Network.

   If the external system is an SAP system, it sends back status information. SAP Ariba Sourcing creates an entry in the **Event Log** with the information and sends email to the event team. If the SAP system successfully created a document (such as the PO or outline agreement) from the award information, the status information includes the SAP ID for the document. If the SAP system could not create a document, the status information includes a comment from the SAP system.

Results

The award approval task is triggered if approvals are required.

Next Steps

By default, clicking **Submit for Award** displays options to **Send Emails to Awarded Participants** and to non-awarded participants. If the **Hide award info from participants** rule is enabled for an RFX event, no award notifications are sent and the email options are not displayed.

After the award is processed, it appears in the **Award** tab.

If this is not a Dutch auction, you can click the **Excel Export** button from the **Award** tab to export the award information to Microsoft Excel.

If this is a Dutch auction, you can click the table icon ( ) from the **Award** tab and select **Export to Excel** › **Export all Rows** to export the award information to Microsoft Excel.

If you change your mind about an award scenario after you submit, you can modify the scenario and submit again. The scenario you submit later will overwrite the previous value of the award.

Related Information

About Awarding Events [page 316]
Approving Events for Award [page 342]

Awarding Single Items or Lots to Multiple Suppliers in a Manual Scenario

Use this procedure to award a single item or a lot to multiple suppliers in a manual scenario.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Procedure

1. On the **Content** tab, choose **Actions** › **Create Award**.
2. Enter a scenario name.
3. In the pull-down menu for an item or lot, select **Advanced Award.**

   The **Split Award** pop-up window opens.
4. Select whether you want to split the award by **Quantity** or **Percentage** from the **Split Award By** pull-down menu.
5. Enter a value in the **Allocation** field for each supplier.

   For greater accuracy in computation during a manual scenario, if you specify a value with decimal places for the **Split Award**, SAP Ariba Sourcing uses that value to calculate the manual scenario award split.
6. Click **Save**.
7. View the prices and savings for this scenario on the **Summary** tab.
8. Click **Save As** to save a copy of the scenario you are working on.
9. Click **Done** to save and exit the scenario. The scenario is listed on the **Scenario** tab. You can update the scenario and submit it when you are ready.
10. When you are finished with the scenario, click **Submit for award**.
11. **Optional:** Send the award data to the external system.

    If you are using the RFQ and Award Integration with SAP Ariba Sourcing feature, and you created your event from a sourcing request project, or you are using the Award Integration Using Material Master Item Data feature and want to send award data to the external system, complete this step.

    > Note
    >
    > By default, a scenario must be awarded before you can award data to an external system. You can also send draft award scenario data to an external system if the **Send draft award scenarios to external ERP systems** parameter is set to **Yes**. For more information about this parameter, seeSend draft award scenarios to external ERP systems . For information about managing parameters, refer to Intelligent Configuration Manager Administration.

    a. Choose **Actions** › **Send Quotes to External System** to send the award information to the external system.

       The event owner invites suppliers manually. However, if you do not have an active relationship with the awarded suppliers on SAP Business Network, or if the suppliers do not have a valid Vendor Key, then the award information cannot be sent to the external system. For more details, see Enabling Suppliers on SAP Business Network.

    If the external system is an SAP system, it sends back status information. SAP Ariba Sourcing creates an entry in the **Event Log** with the information and sends email to the event team. If the SAP system successfully created a document (such as the PO or outline agreement) from the award information, the status information includes the SAP ID for the document. If the SAP system could not create a document, the status information includes a comment from the SAP system.

Results

The awards appear in the **Award** tab.

Using Optimization Scenarios to Award Suppliers

Optimization scenarios enable you to analyze the award decision for a large or complex event. The optimization helps you make the award decision by allowing you to create and compare hypothetical awarding models with specific constraints to determine the potential awarding results. You do not have to accept any of the scenarios. When you are done with your analysis, you can accept the award scenario or scenarios that makes sense to you.

Optimization can be a useful decision-making tool, however you must know your baseline first to understand the scenarios that optimization can provide. To get the most out of the optimizations, run a first scenario without constraints to determine what SAP Ariba Sourcing offers as the optimal choice without the influence of the constraints. After obtaining that result, create scenarios with constraints to see how they vary from the unconstrained result.

By default, the optimization scenario may award more items than specified in the item group. If you want to exclude items from your optimization scenario, you can add a second item group and constraint that explicitly excludes the items that you do not want to award. For example, if you have an event with multiple sections, each for a different location, with each section containing identical items. In this example, if you want to award specific items in each section, you can create a second item group and constraint that explicitly excludes the items that you do not want to award.

When creating optimization scenarios, keep in mind:

- You use optimization to help you make the best (optimal) decisions for your business.
- Think about the goal of your optimization. Often this will be to minimize total price. It can also be something like maximize total score or minimize total cost.
- The **Maximize Score** goal maximizes the score based on the line items being optimized, not on the total score for the supplier. To have the system pick Suppliers accordingly, set up Scoring for the Line Items as well. After the Event goes to **Pending Selection** status, get the grading and Scoring for the event, enter **Consensus Grade** on the items as well, and then use the **Maximize Score** option in Optimization.
- Be careful when you add multiple constraints to scenarios. The optimal value will not get better (and often gets worse) as you add more constraints.
- You can use scenarios to model different constraints and to see the costs of imposing those constraints on the possible award.
- If your event contains a Quantity field, the field must contain an initial value at the event level in order for optimization scenarios to work correctly. If you set initial values for the Quantity field and the supplier changes it to the quantity they supply, optimization scenarios will still work correctly.

Preconfigured Optimization Scenarios

SAP Ariba provides the following preconfigured event optimization scenarios:

- **Incumbent Suppliers**
- **Best Bid**
- **Best Bid with Limited Number of Suppliers**
- **Best Savings**

For information about using the preconfigured event optimization scenarios, see Awarding Events Using Preconfigured Optimization Scenarios [page 337].

Optimization Status

There are four possible optimization statuses.

Optimization Status	Definition
DRAFT	This is a manual scenario that you are still editing.
IN PROCESS	The optimization is being processed and will be done soon.
OPTIMIZED	The optimization process has completed successfully.
OPTIMIZATION FAILED	There are conflicting constraints that prevent successful optimization. For example, if there is a constraint that you must award more than 20% to Company A, and another constraint that you cannot award more than 10% to Company A, it becomes a conflict.

Optimization Example

Here is an optimization example with three suppliers, several constraints, and six scenarios.

The table below shows the items and final bids from an auction:

Line #	Item Name	Quantity	Supplier A	Supplier B	Supplier C
	Years in Business		39	15	1
Line 1	Computer	300	$1250	$1200	$1150
Line 2	Monitor	300	$250	$240	$260
Line 3	Printer	20	$580	$600	$650

The following table lists the optimization scenarios for the final bids listed in the table above

Scenario	Constraints	Total Price	Line 1 (Computer)	Line 2 (Monitor)	Line 3 (Printer)
Scenario 1: Best Price	None	$428,600	Supplier C (100%) $345,000	Supplier B (100%) $72,000	Supplier A (100%) $11,600
Scenario 2: Two Suppliers	At most, two suppliers for the entire event	$429,000	Supplier C (100%) $345,000	Supplier B (100%) $72,000	Supplier B (100%) $12,000
Scenario 3: One Supplier	At most, one supplier for the entire event	$436,000	Supplier C (100%) $345,000	Supplier C (100%) $78,000	Supplier C (100%) $13,000
Scenario 4: Older Companies	Only suppliers with 10 or more years in business	$443,600	Supplier B (100%) $360,000	Supplier B (100%) $72,000	Supplier A (100%) $11,600
Scenario 5: Older Companies; No Supplier B Monitors	Only suppliers with 10 or more years in business; Exactly 0 monitors from Supplier B	$446,600	Supplier B (100%) $360,000	Supplier A (100%) $75,000	Supplier A (100%) $11,600
Scenario 6: Only Half of the Computers to Supplier C	No more than 50% of the computers to Supplier C	$436,100	Supplier B (50%) $180,000; Supplier C (50%) $172,500	Supplier B (100%) $72,000	Supplier A (100%) $11,600

In the table above, Scenario 1 is a scenario with no constraints. Since this scenario has no constraints, it is one of the lower cost solutions.

Dealing with several suppliers has costs, so the buyer wants to know if having three suppliers is worth the expense. Scenarios 2 and 3 provide the prices for limiting the number of suppliers to one or two. Using two suppliers costs $400 ($429,000 - $428,600) and limiting to one supplier costs an additional $7000 ($436,000 - $429,000). If the buyer finds that each added supplier costs approximately $5000 then limiting to two suppliers makes sense but limiting to one does not.

The buyer assumes that older companies are more reliable than newer companies. To verify the cost of using only suppliers that have been in business for 10 or more years the buyer ran Scenario 4. This result shows that using only older companies costs the buyer an additional $15,000 ($443,600 - $428,600). The buyer must decide if it is worth the extra money to avoid using a supplier who has been in business for a shorter time.

Scenario 5 models not buying monitors from Supplier B while still limiting the selection to older suppliers. The buyer might run this scenario if they know that Supplier B's monitors are lower quality. We see from the results that this costs an additional $3,000 on top of the $15,000 for choosing older suppliers.

In Scenario 6 the buyer tries to reduce the risk of using the younger supplier by limiting the purchase to no more than 50 percent of the computers. This constraint adds $7,500 to the cost over the best price scenario 1.

Notice that as the scenarios become more constrained that the cost for the buyer goes up. For example, Scenario 3 costs more than Scenario 2, which costs more than Scenario 1. Similarly, Scenario 5 costs more than Scenario 4, which costs more than Scenario 1.

Splitting Awards by Quantity or Percentage

You can award an event with multiple items to multiple suppliers. For example, if an event has 5 items, you can award 3 items to one supplier and 2 items to another supplier.

You can also award a single lot to multiple suppliers and split the award by percentage or quantity. This scenario is useful if your awarding decision is fairly obvious.

Related Information

Awarding Single Items or Lots to Multiple Suppliers in a Manual Scenario [page 321]

Overview of Creating an Award Optimization Scenario by Setting Constraints

This section gives a basic overview of creating an award optimization scenario by setting constraints, along with an example. For complete details, see Awarding Events Using Event Optimization Scenarios [page 333].

Creating an optimization scenario involves three basic steps:

- Choosing the overall goal for the scenario
- Setting constraints on item groups
- Running the optimization and deciding on the awards

When you create an optimization scenario, you choose one of four overall goals:

- Lowest extended price
- Most savings (based on historic price [page 124])
- Optimization of the value of terms or functions
- Optimization based on your own scoring functions that evaluate supplier bids per item

Lowest extended price is the default overall goal. For more on scoring functions that evaluate supplier bids, see Grading and Scoring.

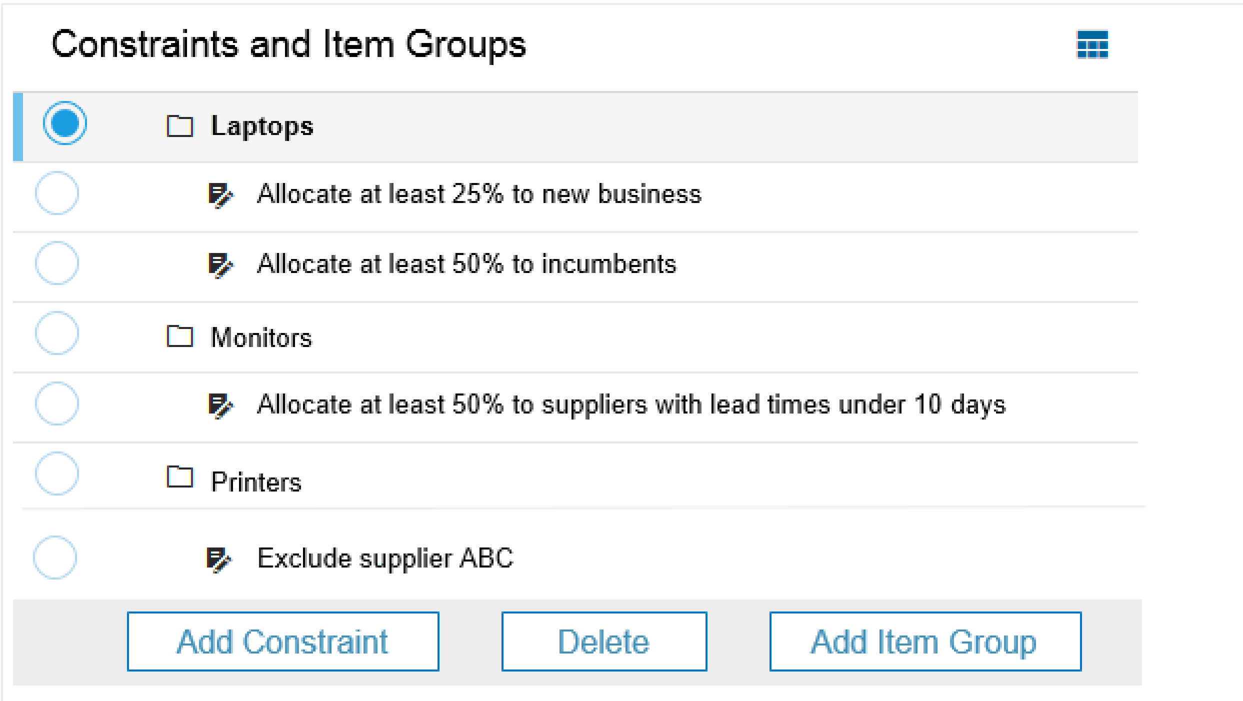
When you set constraints, they apply to a particular item group. For award optimization, you arrange items into an item group so that you can apply the same constraints to all items in that group. For more on setting up item groups, see steps 5 - 8 in Awarding Events Using Event Optimization Scenarios [page 333].

> → Tip
>
> Create as many optimization scenarios as you want to model various results for your award. Be sure to create one scenario with no constraints so you can use that result as a baseline and compare that result to other scenarios that have constraints.

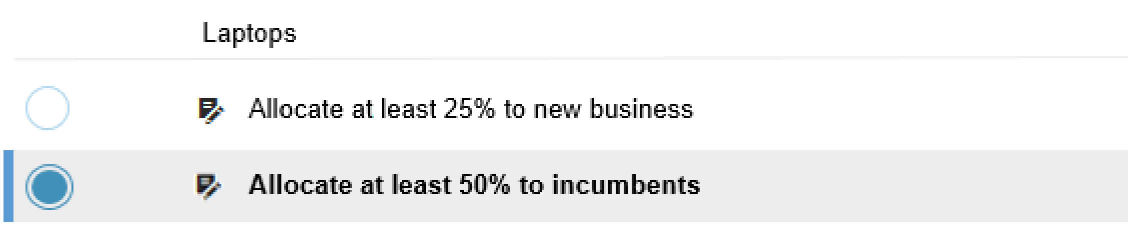
To create an award optimization scenario, the event must be in a **Pending Selection** state. **Create** › **Optimization Scenario** can be found in one of two places:

- On the **Scenario** tab
- If real-time optimizations are enabled for your site, on the **Content** tab, expand the **Scenarios** area near the top of the page.

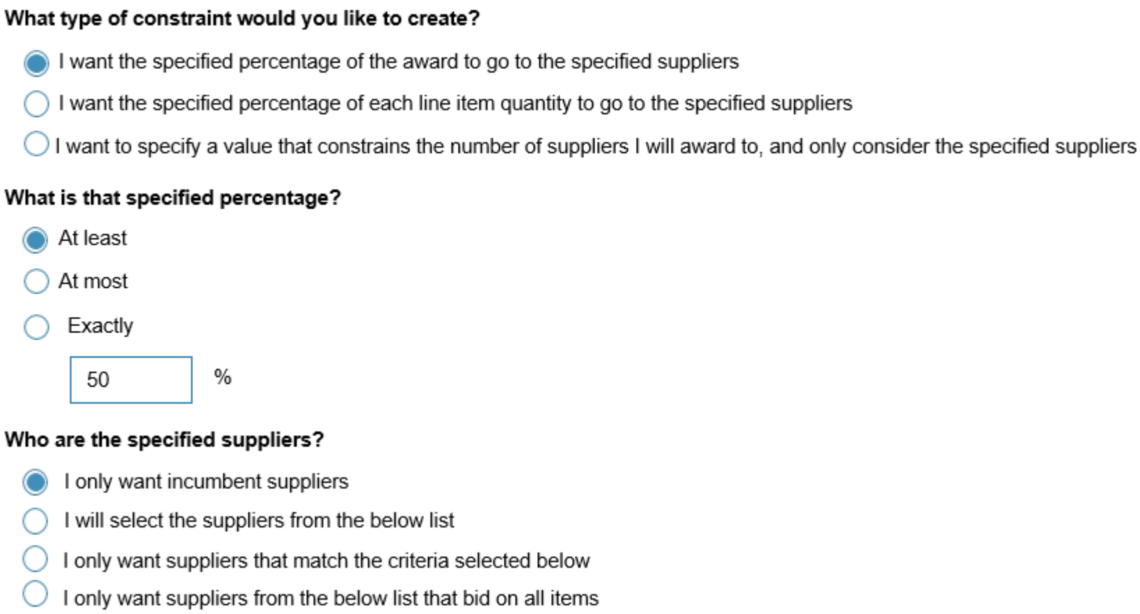
In the following example, the user defined item groups for laptops, monitors, and printers. The user added constraints by clicking the radio button for each item group, then choosing **Add Constraint**. Each item group can have multiple constraints. For example, the laptop item group has two constraints: allocate at least 50% of the award to incumbents, and allocate at least 25% of the award to new business.



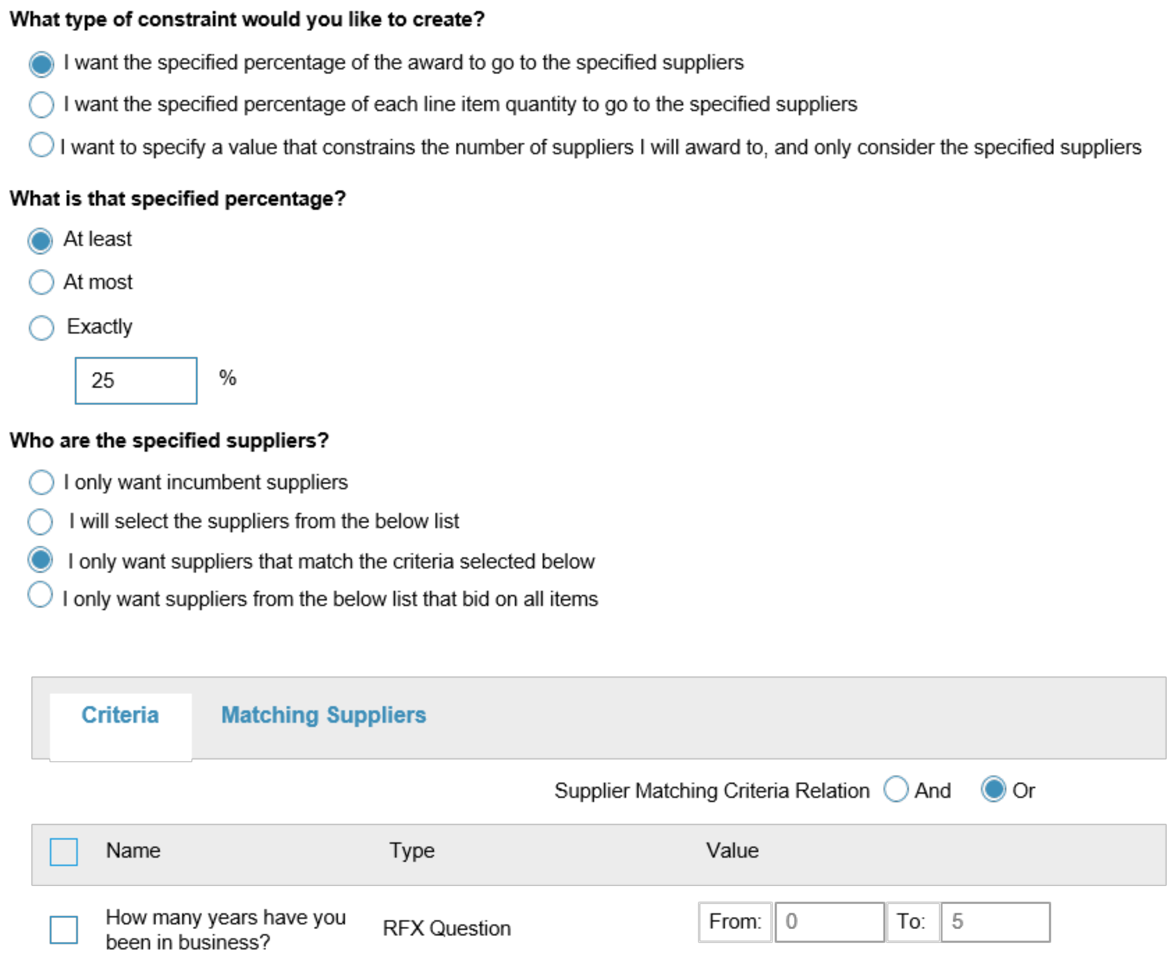
To set a constraint for laptops, click the radio button next to **Laptops** and then click **Add Constraint**. To edit a constraint, click the radio button next to it.



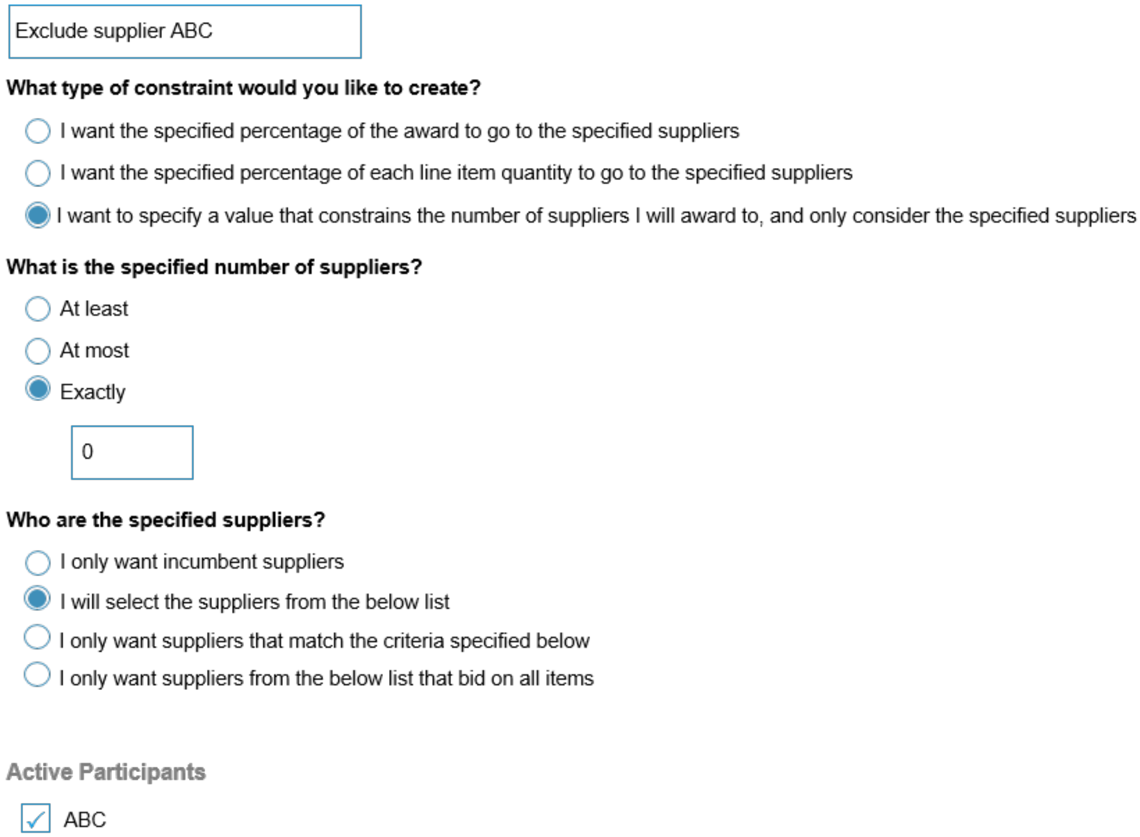
The constraints in the following image specify that for laptops, at least 50% of the award will go to incumbents.



In addition to awarding at least 50% of the laptop business to incumbents, in this scenario, another 25% of the laptop award will go to new businesses. In this specific example, new businesses are defined within the constraints as companies that have been in business for less than five years. The following image shows a separate constraint defined under the laptops item group.


What type of constraint would you like to create?
I want the specified percentage of the award to go to the specified suppliers
I want the specified percentage of each line item quantity to go to the specified suppliers
I want to specify a value that constrains the number of suppliers I will award to, and only consider the specified suppliers
What is that specified percentage?
At least
At most
Exactly
25
%
Who are the specified suppliers?
I only want incumbent suppliers
I will select the suppliers from the below list
I only want suppliers that match the criteria selected below
I only want suppliers from the below list that bid on all items
Criteria
Matching Suppliers
Supplier Matching Criteria Relation
And
Or
Name
Type
Value
How many years have you been in business?
RFX Question
From:
0
To:
5

The printers items group has a single constraint, which is to exclude supplier ABC from the award.



To run the optimization, click **Optimize**.

To choose this scenario for the award, choose the scenario name and click **Edit**. Click the **Award Proposal Details** tab and select the participants to be awarded the lots. When you are finished, click **Submit for Award**.

Adding Constraints to an Item Group in Award Optimization Scenarios

Buyers can run optimization scenarios to narrow down the suppliers awarded for an event. When you run an optimization scenario, the event is awarded to the suppliers based on the constraints applied.

Optimization scenarios enable you to analyze the award decision for a large or complex event. When buyers run optimization scenarios, they can create alternate winner scenarios and retain them in the event. You can award business to suppliers based on one or several of the optimization scenarios.

This feature enables buyers to autogroup items based on region and commodity and run optimization scenarios. You can set up the region, commodity, and item terms as constraints for either all items or specific items in an item group. You can choose to add one or all constraints (region, commodity, and item term). You can also choose to add multiple regions, commodities, or item terms as constraints. The resulting scenario awards one or more suppliers who fulfill the constraints applied to either all the items or selected items in the item group.

In in the following example, constraints for an item group:

- Maximum of two suppliers per region
- Maximum of five suppliers per commodity
- Maximum of three suppliers per item

The resulting scenario would award suppliers who fulfill the constraints either for all items or the selected items in the item group.

Adding Constraints to an Item Group

Use this procedure to add contraints to an item group. You can run optimization scenarios to award to suppliers who fulfill the constraints applied to an item group.

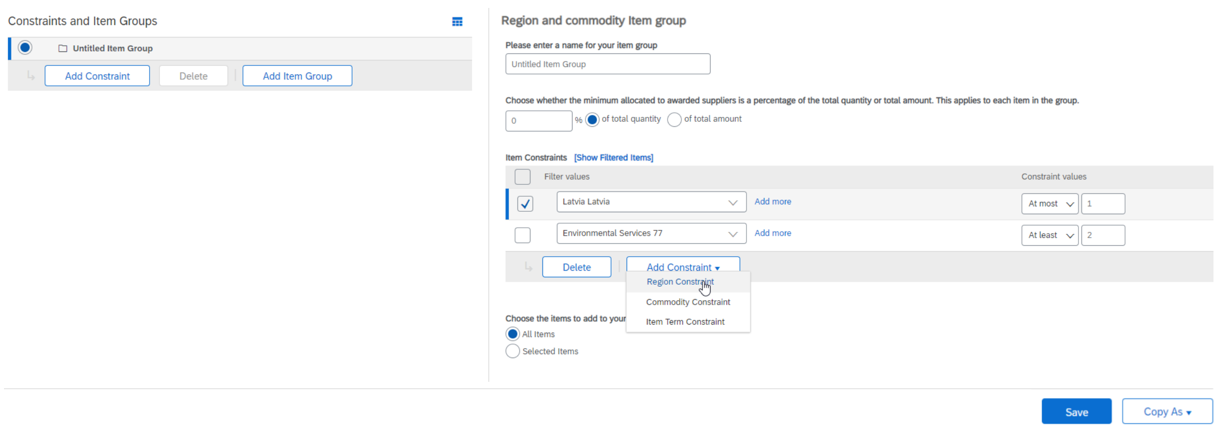
Prerequisites

You must be the event owner or have project owner capabilities for the event.

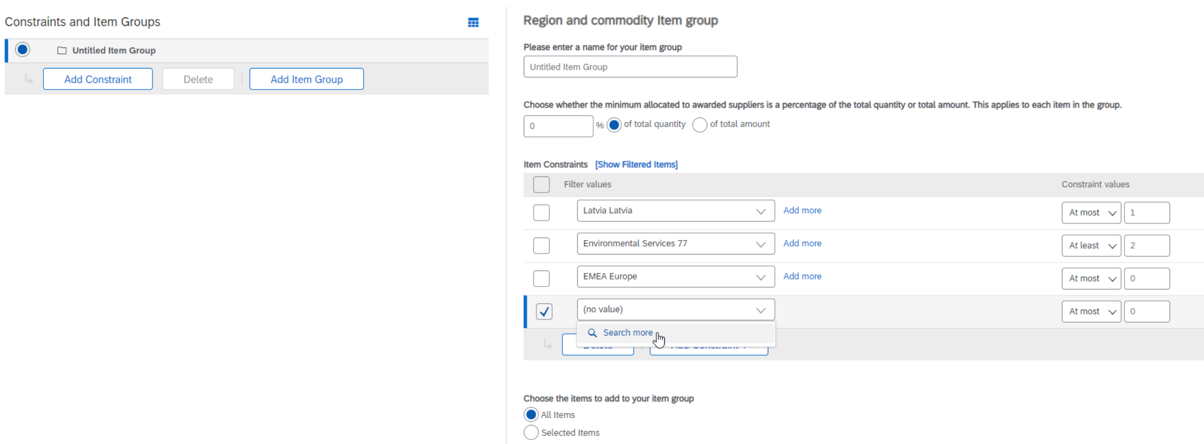
Procedure

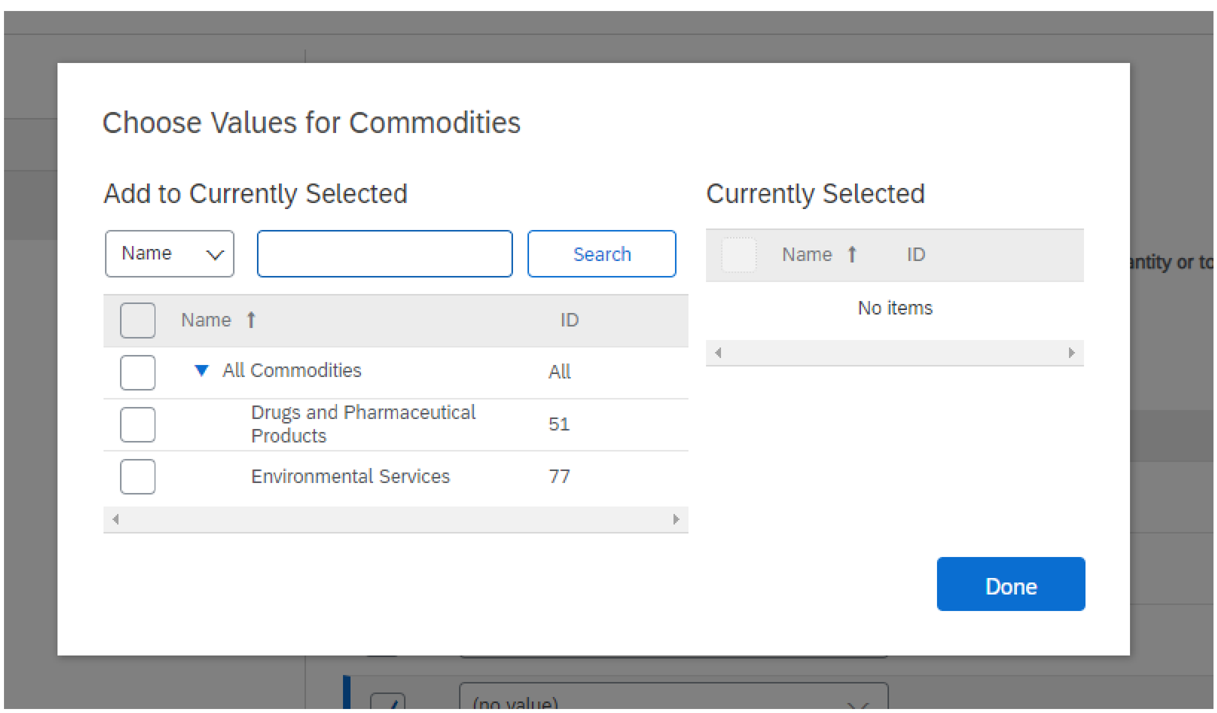
1. Complete one of the following actions to view the prepackaged optimization scenarios:
    - Click the **Scenario** tab from the event monitoring page for an event in the **Pending Selection**state.
    - If real-time optimizations are enabled for your site, go to the **Content** tab. Expand the **Scenarios** area near the top of the page.
2. Enter a name for the scenario on the **Goals and Constraints** tab.
3. Select a goal for the scenario.
4. Select a response for **Would you like to award based on minimizing the number of suppliers?**.
5. Click **Add Item Group** to create an item group. An item group is a group of lots or line items that you select and then apply specific constraints to the group.
6. Click **Add Constraints** in the item group area and choose from the following options:
    - **Region Constraint**
    - **Commodity Constraint**
    - **Item Term Constraint**

    You can choose the constraint you want to add to the item group from the list.



7. Click **Search more** and choose from the list displayed in a popup window. To add multiple entries, you can click **Add more**.





8. Set up the remaining criteria for the scenario and click **Optimize** to optimize the scenario by applying the constraints specified.

Awarding Events Using Event Optimization Scenarios

Use this procedure to award events using event optimization scenarios.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> Only project owners can create scenarios.

Context

Your award can be based on multiple scenarios. For example, you can have one scenario that focuses on item group 1, and another scenario that focuses on item group 2. You can eventually submit both of these scenarios for award.

Procedure

1. Complete one of the following actions to open a page for an optimization scenario:
   - From the **Scenario** tab for an event in the **Pending Selection** state, choose **Create** > **Optimization Scenario**.
   - If real-time optimizations are enabled for your site, go to the **Content** tab. Expand the **Scenarios** area near the top of the page. Choose **Create** > **Optimization Scenario** from the scenarios table.
2. On the **Goals and Constraints** tab, enter a name for this scenario.
3. Select the goal for the scenario.

   Depending on the terms for items in the event, the possible choices can be:
   - **I want to select bids with the lowest extended cost.**
   - **I want to select bids with the most savings.**
   - **I want to select bids based on my scoring functions that evaluate the supplier's bids per item.**
   - **Minimize** *`term`*
   - **Maximize** *`term`*

   Where *`term`* is the name of a term or function that meets the following criteria:

- **Rollup in section summary** or **Rollup results in section summary** is set to **Yes**.
- **Will participants compete on this term** is set to **Yes, Downward Bidding** or **Yes, Upward Bidding**.

4. Select a response for **Would you like to award based on minimizing the number of suppliers?** If you select **Yes**, the scenario selects the smallest group of suppliers that can supply everything you need without considering price. This goal takes precedence over the price goals you select, and is calculated first by the optimization.

   If you choose to minimize the number of suppliers and have selected a goal to minimize costs or maximize savings, you get the smallest number of suppliers that can provide the lowest total cost (ot greatest savings). You might have to choose certain line items. For example, your optimization of lowest total cost and minimum suppliers offers you Supplier A and Supplier B, for line items 1 though 7. You find that Supplier A can supply line items 1 though 4, and Supplier B can supply line items 4 through 7. Your choice is clear for items 1 through 3, and also for items 5 through 7. You will have to make a choice about item 4 however, because both suppliers can provide you with that item.
5. Click **Add Item Group** to create an item group. An item group is a group of lots or line items that you select and then apply specific constraints to the group. You can have multiple item groups, with constraints for each item group. For example, if you were purchasing computers and their various components, you can have an item group that focused on printers, another that you used to determine pricing on peripherals such as keyboards, and yet another item group to use for software purchases.
6. If you choose **All Items,** the item group definition is complete.
7. If you choose **Selected Items** and this is a standard-capacity event, click **Add Items** to add lots or line items to the group. You can use item groups to create various scenarios that focus on specific groups of goods.

   If this is a large-capacity event (there is an **Import from Excel** link), use the procedure described in Selecting Large-Capacity Event Items for Optimization Award Scenarios [page 340] to select items.
8. Select the items to add to the group and click **OK**.
9. Click **Add Constraints** next to the item group to add constraints.
10. Specify the criterial for the constraint.

    When configuring constraints, the dialog box shows the following prompts:

    - **What type of constraint would you like to create?** with the following options:
        - **I want the specified percentage of the award to go to the specified suppliers**
        - **I want the specified percentage of each line item quantity to go to the specified suppliers**
        - **I want to specify a value that constrains the number of suppliers I will award to, and only consider the specified suppliers**
    - **What is that specified percentage?** or **What is the specified number of suppliers?** with options to specify **At least**, **At most**, or **Exactly** and a number.
    - **Who are the specified suppliers?** Depending on the suppliers in the event, the possible choices can be:
        - **I want to consider all of the active suppliers**
        - **I only want incumbent suppliers**
        - **I will select the suppliers from the below list**
        - **I only want suppliers that match the criteria specified below** (you can base the criteria on answers to questions posed during the event, supplier profile criteria, or line item terms, such as Price or Quantity).
        - **I only want suppliers from the below list that bid on all items**

    If you select **I only want suppliers that match the criteria selected below**, use the **Criteria** tab to specify criteria. Use the **Supplier Matching Criteria Relation** choices (**And** or **Or**) to choose if all or any of the specifications must be met. For example, specify **Or** if you specified **Minority Owned Business** and **Woman Owned Business**, and want to award business to a supplier who fulfills either criteria. Specify **And** if you want to award business only to suppliers who match both criteria

After you have specified supplier criteria, open the **Matching Suppliers** tab to view a list of suppliers that meet the criteria.

The text version of the constraint restates the constraints you have chosen in a sentence. Review this sentence before deciding to optimize, to be sure that you have chosen the constraints you want. Click **Update** to update the text after changing any constraint.

11. When you are finished with the scenario, click **Optimize**. This runs the optimization on the scenarios, applying the constraints you specified. After optimization, you have the option to continue working or view your scenarios.

    By combining the ability to create an item group of selected line items, with the ability to create a constraint on that item group, you can set up scenarios with constraints such as the ones below:

    - Allocate exactly 100 computers to Supplier A
    - Allocate at most 50 monitors to Supplier B; none to Supplier C
    - Allocate business only to suppliers who have been in business more than 10 years
    - Allocate 50% of the business to two suppliers
      An optimization scenario can have as few as one defined objective, and you can add any number of constraints. Note that adding numerous constraints does not make the optimal value of the objective better. In other words, if you are optimizing total price then adding a new constraint to an existing scenario will not make the lowest total price better. Also, removing constraints cannot make the optimal value worse.
      Do not specify mutually exclusive constraints. For example, if you request that at least 75% of the computers be from Supplier A and at least 75% of the computers be from Supplier B, then it is not possible to satisfy both of these constraints at the same time.
12. After optimization completes, select the scenario name and click **Edit**.
13. Click the **Award Proposal Details** tab. Select the award participants for the various lots.
14. View the optimizations for this scenario on the **Summary** tab.
15. After you run the optimization, you can view the scenario in read-only mode by going to the **Scenario** tab and selecting **View**.

    You can select **Edit** to edit the scenario title, set an optimization goal, edit constraints, and specify whether the document must be created in the event currency (default) or in the supplier-bid currency. If all the line items awarded to a supplier are not bid in the same currency, the document is created in the external system for the scenario or award in the event currency. If you decide to modify the award allocations, you can save the optimization scenario as a manual scenario, modify the allocations, and submit the scenario for award.
16. When you are finished with the scenario, click **Submit for Award**.
17. **Optional:** Send the award data to the external system.

    If you are using the RFQ and Award Integration with SAP Ariba Sourcing feature, and you created your event from a sourcing request project, or you are using the Award Integration Using Material Master Item Data feature and want to send award data to the external system, complete this step.

    > ⓘ Note
    >
    > By default, a scenario must be awarded before you can award data to an external system. You can also send draft award scenario data to an external system if the **Send draft award scenarios to external ERP systems** parameter is set to **Yes**. For more information about this parameter, seeSend draft award

scenarios to external ERP systems . For information about managing parameters, refer to Intelligent Configuration Manager Administration.

a. Choose **Actions** > **Send Quotes to External System** to send the award information to the external system.

   The event owner invites suppliers manually. However, if you do not have an active relationship with the awarded suppliers on SAP Business Network, or if the suppliers do not have a valid Vendor Key, then the award information cannot be sent to the external system. For more details, see Enabling Suppliers on SAP Business Network.

If the external system is an SAP system, it sends back status information. SAP Ariba Sourcing creates an entry in the **Event Log** with the information and sends email to the event team. If the SAP system successfully created a document (such as the PO or outline agreement) from the award information, the status information includes the SAP ID for the document. If the SAP system could not create a document, the status information includes a comment from the SAP system.

Results

The award approval task is triggered if approvals are required.

Next Steps

By default, clicking **Submit for Award** displays options to **Send Emails to Awarded Participants** and to non-awarded participants. If the **Hide award info from participants** rule is enabled for an RFX event, no award notifications are sent and the email options are not displayed.

After the award is processed, it appears in the **Award** tab.

If this is not a Dutch auction, you can click the **Excel Export** button from the **Award** tab to export the award information to Microsoft Excel.

If this is a Dutch auction, you can click the table icon ( ) from the **Award** tab and select **Export to Excel** > **Export all Rows** to export the award information to Microsoft Excel.

If you change your mind about an award scenario after you submit, you can modify the scenario and submit again. The scenario you submit later will overwrite the previous value of the award.

Create as many optimization scenarios as you want to model various results for your award. Be sure to create one scenario with no constraints so you can use that result as a baseline and compare that result to other scenarios that have constraints.

Related Information

About Awarding Events [page 316]
Approving Events for Award [page 342]

Selecting Large-Capacity Event Items for Optimization Award Scenarios [page 340]

Awarding Events Using Preconfigured Optimization Scenarios

Use this procedure to award events using preconfigured optimization scenarios.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

SAP Ariba provides the following preconfigured optimization scenarios:

- **Incumbent Suppliers**
- **Best Bid**
- **Best Bid with Limited Number of Suppliers**
- **Best Savings**

The **Best Bid** scenario selects the bids with the lowest extended cost. The scenario is defined as follows:

- Goal: **I want to select bids with the lowest extended cost.**
- **Would you like to award based on minimizing the number of suppliers?**: **No**. You can change this to **Yes** to select the bids with the lowest extended cost using the fewest number of suppliers.
- Constraint: none.

The **Incumbent Suppliers** scenario selects the bids with the lowest extended cost using incumbent suppliers. If an item has no bids from an incumbent supplier, the scenario selects the lowest bid from a non-incumbent supplier. The scenario is defined as follows:

- Goal: **I want to select bids with the lowest extended cost.**
- **Would you like to award based on minimizing the number of suppliers?**: **No**.
- Constraint:
  - **I want to specify a value that constrains the number of suppliers I will award to, and only consider the specified suppliers**
  - **At least: 1**
  - **I only want incumbent suppliers**

The **Best Bid with Limited Number of Suppliers** scenario selects the bid with the lowest extended cost with a user-specified maximum number of suppliers. This scenario is useful if you want to award more than one supplier so you are not dependent on a single supplier, but do not want to exceed a certain number of suppliers. The scenario is defined as follows:

- Goal: **I want to select bids with the lowest extended cost.**
- **Would you like to award based on minimizing the number of suppliers?**: **No**.
- Constraint:
  - **I want to specify a value that constrains the number of suppliers I will award to, and only consider the specified suppliers**
  - **At most: 2**

    > ⓘ Note
    >
    > Change this value to the maximum number of suppliers you want to award.
  - **I want to consider all of the active suppliers**

The **Best Savings** scenario selects bids so that savings (the difference between the historical price and the bid price) are maximized. The scenario is defined as follows:

- **I want to select bids with the most savings.**
- **Would you like to award based on minimizing the number of suppliers?**: **No**.
- Constraint: none.

Procedure

1. Complete one of the following actions to view the preconfigured optimization scenarios:
   - Click the **Scenario** tab from the event monitoring page for an event in the **Pending Selection**state.
   - If real-time optimizations are enabled for your site, go to the **Content** tab. Expand the **Scenarios** area near the top of the page.
2. If real-time optimizations are enabled for your site and you do not want to modify the scenarios, click selection box for the scenario you want to use. Go to step 6.
3. If real-time optimizations are not enabled for your site or you want to modify the scenarios, click the selection box for the scenario you want to use. Click **Edit**.
4. If you selected the **Best Bid with Limited Number of Suppliers** scenario, go to the **Constraints and Item Group** box click the selection box for the **Best Bid with Limited Number of Suppliers** constraint.
   a. Change the value below **At most** from `0` to the maximum number of suppliers you want to award, such as 2.
   b. **Optional:** Change the **Title** and **Text Version**.
5. **Optional:** To apply the scenario to a subset of the items in the event, click the selection box for the **All Items** item group.
   a. Click the selection box for **Selected Items**.
   b. If this is a standard-capacity event, click **Add Items** and select items.

      If this is a large-capacity event (there is an **Import from Excel** link), use the procedure described in Selecting Large-Capacity Event Items for Optimization Award Scenarios [page 340] to select items.
6. Click **Optimize.** This runs the optimization on the scenarios, applying the constraints you specified. After optimization, you have the option to continue working or view your scenarios.

7. When you are finished with a scenario, click **Submit for Award**.
8. **Optional:** Send the award data to the external system.

   If you are using the RFQ and Award Integration with SAP Ariba Sourcing feature, and you created your event from a sourcing request project, or you are using the Award Integration Using Material Master Item Data feature and want to send award data to the external system, complete this step.

   > ⓘ Note
   >
   > By default, a scenario must be awarded before you can award data to an external system. You can also send draft award scenario data to an external system if the **Send draft award scenarios to external ERP systems** parameter is set to **Yes**. For more information about this parameter, seeSend draft award scenarios to external ERP systems . For information about managing parameters, refer to Intelligent Configuration Manager Administration.

   a. Choose **Actions** > **Send Quotes to External System** to send the award information to the external system.

      The event owner invites suppliers manually. However, if you do not have an active relationship with the awarded suppliers on SAP Business Network, or if the suppliers do not have a valid Vendor Key, then the award information cannot be sent to the external system. For more details, see Enabling Suppliers on SAP Business Network.

   If the external system is an SAP system, it sends back status information. SAP Ariba Sourcing creates an entry in the **Event Log** with the information and sends email to the event team. If the SAP system successfully created a document (such as the PO or outline agreement) from the award information, the status information includes the SAP ID for the document. If the SAP system could not create a document, the status information includes a comment from the SAP system.

Results

The award approval task is triggered if approvals are required.

Next Steps

By default, clicking **Submit for Award** displays options to **Send Emails to Awarded Participants** and to non-awarded participants. If the **Hide award info from participants** rule is enabled for an RFX event, no award notifications are sent and the email options are not displayed.

After the award is processed, it appears in the **Award** tab.

If this is not a Dutch auction, you can click the **Excel Export** button from the **Award** tab to export the award information to Microsoft Excel.

If this is a Dutch auction, you can click the table icon ( ) from the **Award** tab and select **Export to Excel** > **Export all Rows** to export the award information to Microsoft Excel.

If you change your mind about an award scenario after you submit, you can modify the scenario and submit again. The scenario you submit later will overwrite the previous value of the award.

Related Information

Selecting Large-Capacity Event Items for Optimization Award Scenarios [page 340]

Selecting Large-Capacity Event Items for Optimization Award Scenarios

Use this procedure to select large-capacity event items for optimization award scenarios.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

If you want to run an optimization scenario to create awards for a large-capacity event with an item group that contains a subset of the event items, you must use an Excel document to specify the items.

Procedure

1. Open or create an optimization scenario for awards as described in Awarding Events Using Event Optimization Scenarios [page 333] or Awarding Events Using Preconfigured Optimization Scenarios [page 337].
2. Click **Add Item Group** to create an item group or click the selection box for an existing item group.
3. Click the selection box for **Selected Items**.
4. Click **Import from Excel**.

   The **Import Item Group from Excel** page opens.
5. Click the **Click here to open your Item Group in an Excel Spreadsheet** link.
6. Save the content to your computer.
7. Edit the spreadsheet in Microsoft Excel.

   Review the instructional worksheets and note the background colors that indicate which cells are required, optional, or read-only.

   Open the **Item Filter** worksheet. By default, the value of the **Selection** column is **Yes** for each line item. To exclude an item from the item group for the scenario, change the **Selection** value to **No**.
8. Save the edited Excel spreadsheet to your computer.

9. Return to the **Import Item Group from Excel** page. Click **Browse** and locate your edited Excel spreadsheet.
10. Click **Upload**.

    The item group is updated with the selected items, but the status message **There are** *n* **items in this group** does not immediately indicate the number of items selected for the group. You can update this message by closing the optimization scenario and re-opening it.
11. Continue working with the scenarior as described in Awarding Events Using Event Optimization Scenarios [page 333] or Awarding Events Using Preconfigured Optimization Scenarios [page 337].

Viewing Event Award Approval Tasks

Use this procedure to view event award approval tasks.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> **Restriction**
>
> Only project owners can create scenarios.

Context

You can use the **Award Approval Task** to route approvals for the submitted scenarios before they are awarded.

Procedure

1. While monitoring the event, choose **Actions** > **View Award Approval Task**.
2. Click **Approval Flow**.

Next Steps

You can view the status of the task and see which reviewers have approved.

Related Information

About Awarding Events [page 316]
Awarding Events Using Manual Scenarios [page 318]
Awarding Events Using Event Optimization Scenarios [page 333]

Approving Events for Award

Use this procedure to approve events for award.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> Only project owners can create scenarios.

Context

You can use the **Award Approval Task** to route approvals for the submitted scenarios before they are awarded.

Procedure

1. When a user has submitted a scenario for you to approve for award, SAP Ariba Sourcing displays an alert link in the **Needs Review** content item on the dashboard.
2. Click the alert link to view the **Award Approval Task**.
3. Click **Approve** or **Deny** to approve or deny the scenario in its entirety.
4. On the **Approved or Denied** page, you can write a message and add an attachment to communicate why you approved or denied the award.
5. Click **OK** when you are finished composing your message.

Related Information

About Awarding Events [page 316]

Awarding Events Using Event Optimization Scenarios [page 333]
Approving Awards at the Line Item Level [page 343]
Requiring Approvals for Event Contents or Award Scenarios (Approval For Publish and Approval For Award Tasks) [page 503]

Approving Awards at the Line Item Level

Use this procedure to approve a subset of the line items in an award, reject the rest, and enter comments related to your approval decisions.

Prerequisites

- This feature is disabled by default. To enable this feature, please have your Designated Support Contact log a service request. An SAP Ariba Customer Support representative will follow up to complete the request.
- To approve awards at the line item level, you must be able to approve and deny awards.
- You must be the approver for an **Approval for Award** task for an event.

Context

Sometimes the approver might wish to approve some, but not all, of the awards proposed in an award scenario. The approver can approve or deny each line item award individually, leaving a comment explaining the decisions. Line items whose awards were denied are added to a new scenario. The task approval notification sent to the buyer details how many awards were awarded and denied, and includes the approver's comments, making it easier to suggest new awards for the rejected line items.

Follow these steps to approve some but not all of the line item awards specified in an award scenario and configure the email notification to the buyer.

Procedure

1. To open the **Award Proposal Details** page, execute the **Review Award Details** action in one fo the following ways:
    - Navigate to **Manage** > **My Tasks**, and then click on the desired award approval task. Click **Review Award Details**.
    - On the **View Task Details** page, click **Event** > **Review Award Details**.
2. Each line item has a check box, located next to **Allocation %**, selected by default, indicating its approval status. Deselect this check box for each line item award you wish to **deny**.

3. Choose **Approve** to approve the awards for all line items whose boxes remain selected. Line items whose boxes have been deselected are denied. If an item is partially awarded and you uncheck one portion, the entire item is removed from the approval. If all the items are deselected, then the task is denied and the scenario is rejected.
4. The follow-up page that appears includes details about the number of items approved and denied. If you wish to include additional comments, enter them in the **Message** field.
5. If necessary, set access control for your comments using the **Access Control** field.
6. If desired, add attachments using the controls in the **Additional Attachments** section.

Results

Denied line items are added to a new scenario. Approved line items proceed to the next stage. The buyer receives an email notification specifying which line items were denied, including the approver's comments and attached documents.

Related Information

Requiring Approvals for Event Contents or Award Scenarios (Approval For Publish and Approval For Award Tasks) [page 503]

Exporting Event Draft Contracts to Your Local Desktop

Use this procedure to export event draft contracts to your local desktop.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

The option is available only after the event is awarded.

> ⚠ Restriction
>
> Only project owners can create scenarios.

Context

This option exports the contract but does not export any reports.

Procedure

1. Click **Contract** and choose **Export Draft Contract** > **To Local Desktop**.
2. Select the supplier.
3. Click **Done**.
4. Click **Export Draft Contract**.

Results

The event details are exported to a Microsoft Excel spreadsheet. You use this spreadsheet as the basis of information that you can complete and then import into SAP Ariba Contracts.

Related Information

About Awarding Events [page 316]
Awarding Events Using Event Optimization Scenarios [page 333]
Exporting Event Draft Contracts to External Systems [page 345]

Exporting Event Draft Contracts to External Systems

Use this procedure to export event draft contracts to external systems.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

This option exports a draft contract if the event has been awarded to an external system by HTTP request. To set this up you need the URL of a web server that accepts a ZIP file containing this data. Call SAP Ariba Customer Support with this URL to enable this feature.

> **Restriction**
> Non-direct-action URLs are not supported.

Context

This option exports the contract but does not export any reports.

You are free to design the receiving URL to handle the ZIP file in any way necessary. The name of the ZIP file is `ResultData_nnn.zip`, where `nnn` is a generated sequence number to keep all subsequent ZIP file names unique.

> **Note**
>
> The ZIP file contains a contract spreadsheet for every supplier to whom you made an award.

Procedure

1. On the **Award** tab, click **Contract.**
2. Choose **Export Draft Contract** > **[external system name]**. When you set this option up, you can define the names to appear on the menu for each external system you define.

Results

This initiates the HTTP request to the specified URL. If you specified a direct-action URL, it opens that URL in your browser window.

Related Information

About Awarding Events [page 316]
Awarding Events Using Event Optimization Scenarios [page 333]
Exporting Event Draft Contracts to Your Local Desktop [page 344]
Ability to create multiple follow-on documents from an awarded scenario

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 [page 316]
Awarding Events Using Event Optimization Scenarios [page 333]
Adding Awarded Events to Existing Contracts [page 348]

Adding Awarded Events to Existing Contracts

Use this procedure to add awarded events to existing contracts.

Prerequisites

To perform this action:

- Your site must have SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- You must be 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.

Procedure

1. On the **Award** tab, choose **Contract** > **Add to Existing Contract**.
2. Select the supplier.

3. Click **Add to Existing Contract**. You can view contracts for the supplier you selected, that have no supplier specified, or for all suppliers.
4. Click **Select** to select the contract to modify.

Results

The contract displays in SAP Ariba Contracts with the Amendment Type set to **Price Update**.

Related Information

About Awarding Events [page 316]
Awarding Events Using Event Optimization Scenarios [page 333]
Creating New Contracts from Awarded Events [page 347]

Overriding the Read-Only Terms in Contracts Created from Sourcing Awards

Use this procedure to override the read-only terms in contracts created from sourcing awards.

Prerequisites

To perform this action:

- Your site must have SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- You must be a member of a group that has permission to create procurement contract workspaces, such as the **Contract Manager** group.
- To override the read-only terms for the line-item definitions, buyers must have the group permission, **Override Readonly Terms in Contracts Templates**.
- Enable the self-service parameter, "`Application.ACM.ReadOnlyTermsforExternalSystemLineItemDefinition`.

Context

Buyers that are integrated with an external ERP system 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. Buyers integrated with an external ERP system 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 buyers create a new contract or edit an existing contract from a sourcing award, buyers can override the read-only terms in the contract templates and make the terms editable.

Procedure

1. Open a sourcing project in completed status.
2. Click the **Awards** tab.
3. Do one of the following:
    1. Click **Contract** and the click **Create New Contract**. The Create New Contract page appears.
        - Click **Override existing read-only terms in contract templates** to override existing read-only terms and make them editable.
        - Choose an awarded supplier.
        - Click **Create New Contract**.
    2. Click **Contract** and the click **Add to Existing Contract**. The Add to Existing Contract page appears.
        - Choose an awarded supplier.
        - Click **Add to Existing Contract**. You can view the list of available contracts.
        - Select the required contract for which you want to override the existing read-only terms and then click **Override existing read-only terms in contract templates**.
        - Click **Override existing read-only terms in contract templates**.
        - Click **OK**.

Bid Analysis

Bid analysis is supported in the classic SAP Ariba Sourcing user interface and the guided sourcing user interface and enables buyers to perform bid analysis tasks for RFP events that are in the pending selection, awarded, or completed state.

Bid analysis involves comparing bids that are received in response to an event, analyzing bids based on historical data, user-defined ranges, and various optimization scenarios.

The key capabilities that this feature provides include:

- Dedicated **Bid Comparison** and **Bid Analysis** sections for each sourcing event. **Bid Comparison** offers an **Overview** and **Item view**, while the **Bid Analysis** provides a tabular view of various details in the sourcing event. These views provide a high-level summary of various bids including the alternative bids. Search options in bid analysis include a standardized search interface and search filters that support all terms including non-numerical terms.

> ⓘ Note
>
> If you are using the classic SAP Ariba Sourcinguser interface, the **Bid Comparison** and **Bid Analysis** sections are present under the **Bid Analysis** tab of the sourcing event.
>
> If you are using the guided sourcing user interface, the **Bid Comparison** and **Bid Analysis** sections are present under the **Bid Comparison** tab of the sourcing event.

- Ability to compare bids with historical spend information and baseline spend, which is the total budget you set for an event, and view the deviations.
- Support for alternative bids and supplier-added line items.
  If an event allows suppliers to submit alternative bids or to add additional line items, and if suppliers have submitted alternative bids or additional line items, you can view and include those details when you perform bid analysis.
- Several filtering options, including range-based filters and predefined filters.
  Filtering options include items, numerical terms such as price and lead time, and suppliers. You can also specify ranges for numerical terms to understand deviations and identify outliers. You can save the filters for reuse and export the filter results from table view to Excel files.
- Ability to apply filters to out-of-the-box scenarios and create manual scenarios based on bid analysis filters.

> ⓘ Note
>
> While sourcing events created from guided sourcing user interface support these features, events created from the classic SAP Ariba Sourcing user interface support only the creation of manual scenarios based on bid analysis filters.

  Ability to apply filters to the out-of-the-box optimization scenarios helps you customize the scenarios and narrow down the data set to meet your specific requirements and to apply the goals and constraints that are part of the optimization scenario to the filtered data set.
- Ability to add notes for bid analysis tasks.
  When you do bid analysis in table or item view, you can add, edit, and delete notes on the bid analysis page. Notes are listed in the **Notes** section of the page.

- Ability to sort bids.
  You can choose to sort the contents based on the supplier name or roll-up terms.

  > ⓘ Note
  >
  > Sorting applies only to the data displayed in the page. For example, if the bid analysis has four pages, and if you select sorting from page 1, the sorting is applied only to data on page 1. You need to repeat sorting for other pages.

- Support for pagination.
  In the **Overview**, the number of suppliers on a page is limited to 5. In the table view, the number of bids on a page is limited to 10.
  You can use the navigation controls to navigate across pages to view all bids available for the event.
- Support for complex terms such as date, address, questions, attachments, and certificates.
  Complex terms are also listed in the **Terms** filter to allow buyers to directly view these terms on the Bid **Analysis** page. The attachments term supports supplier attachments.
- Support for cost breakdown information.
  You can click the hyperlink associated with the cost breakdown term to view the cost breakdown details. Cost breakdown information is also available in the Graph view and in a new tab, **Cost breakdown**.
- Support for service line item.
  Support for service line item enables you to view service line items, service outline, and service specification as line items in the bid analysis tab. Support for service line items enables you to compare bids for service hierarchies that contain service outline and service specifications. You can filter the view based on the service line item, service outline, or service specification.
- Ability to create awards from the guided sourcing user interface
  You can create a single award or create split awards in guided sourcing from the **Award scenarios** > **Bid Analysis** tab. See Awarding guided sourcing events from the bid analysis interface in Managing Events with Guided Sourcing.
- Ability to view supplier ranks based on the supplier bid values for each line item in the **Bid Analysis** table view. You can view the ranks for primary bids, and also for the alternative bids if the event bidding rule **Include alternative pricing bids when bids are ranked** is set to **Yes**. Supplier-added line items are also considered when ranking supplier bids. If two bids have the same value, then they are assigned the same ranks. In such cases, the subsequent bids are not assigned consecutive ranks. For instance, if supplier bid 1 and supplier bid 2 have the same rank (rank 1), then the next ranked, supplier bid 3 will have rank 3. You can also view the difference between the lowest bid (rank 1) and the subsequent bids in terms of percentage.

  > ⓘ Note
  >
  > Ensure that you have chosen a competitive term as the value of the **Filter by** > **Terms** action to view the ranks in the **Bid Analysis** table view.

Prerequisites

- From the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution, enable `Application.ACM.EnableBidAnalysisTab`. For more information, see Enable bid analysis tab for buyers.

- This feature is supported in the classic SAP Ariba Sourcing user interface and the guided sourcing user interface. To use this feature in the guided sourcing user interface, your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must have either **optimization workbench admin** or **optimization workbench** user permissions to be able to use the bid analysis options.
- To create events that support alternative bids and supplier-added line items:
  - Ensure that the following event rules are set to **Yes**:
    - **Can participants create alternative responses?**
    - **Can participants create alternative pricing?**
    - **Include alternative pricing bids when bids are ranked**
    - **Allow supplier to add items**
  - Specify a value not less than `1` for **Number of supplier added items**.
  - Ensure that the terms are created as editable by owner and participant so that suppliers can edit the terms in alternative bids.

Restrictions

- Bid analysis is currently supported only for RFP events.
- Only pricing alternative is supported for bid analysis. Tier and bundle alternatives are currently not supported.
- You cannot apply a saved filter to the out-of-the-box optimization scenario Maximize scoring or incumbent supplier scenario.

Bid Comparison UI

Bid Comparison provides a graphical view of bid responses from different suppliers participating in a sourcing event.

You can see the **Bid Comparison** section for any event that's in the **Pending Selection**, **Awarded**, or **Completed** status. There are multiple ways to locate sourcing events depending on whether you use the classic SAP Ariba Sourcing user interface or guided sourcing, such as:

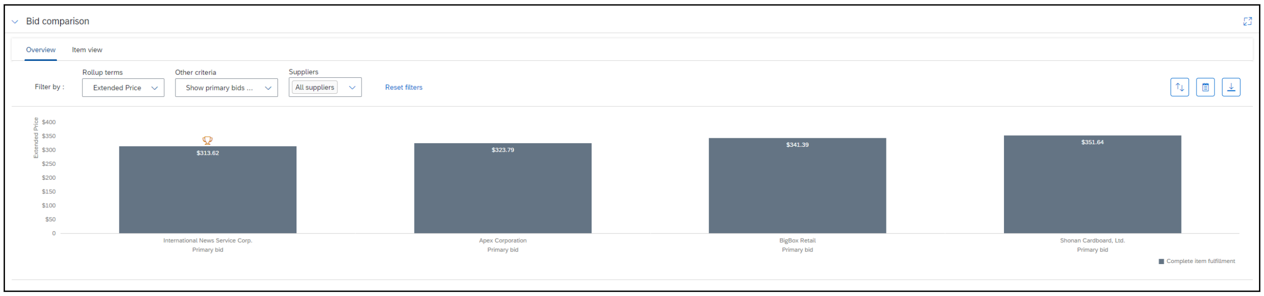
- **Sourcing** > **My Documents**, if you're using the classic SAP Ariba Sourcing user interface. The **Bid Comparison** section is present under the **Bid Analysis** tab of the sourcing event.
- **For you** > **Recently viewed** or **For you** > **Summary** > **Review responses**, if you're using guided sourcing. The **Bid Comparison** section is present under the **Bid Comparison** tab of the sourcing event.

Bid comparison consists of 2 subsections.

Bid Comparison - Overview

In the **Overview** section, you can find a bar chart summarizing bids received from the suppliers participating in the event. The X axis of the bar chart shows supplier bid response corresponding to the filter criteria (**Rollup Terms**) assigned to the Y axis. The bar chart shows data for a maximum of 5 suppliers. If there are more than 5 suppliers participating in the event, data is paginated and you can use the pagination controls to navigate through the pages.

The following image shows the **Overview** section of a sourcing event.

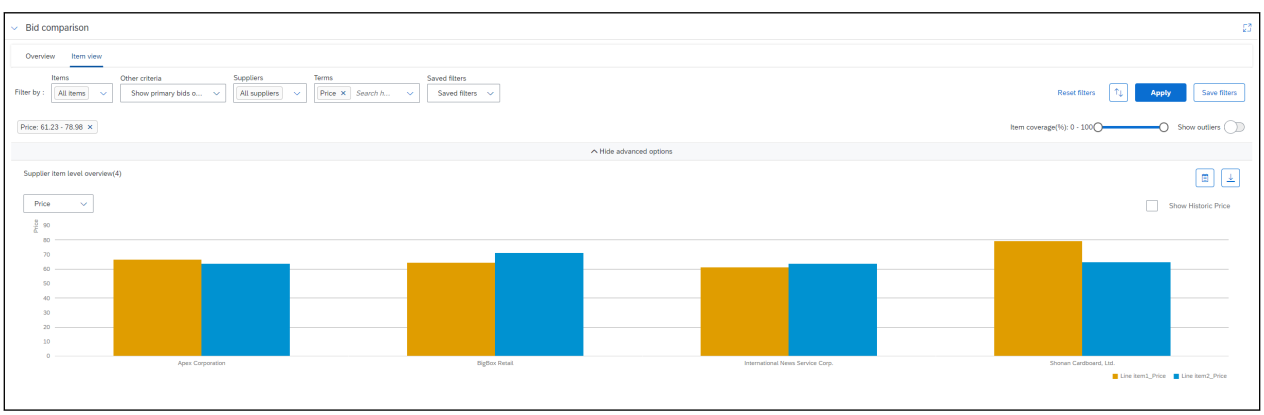


Action	Result
Filter By	Streamline data by customising filter criteria as applicable. The filters are dynamic and are applied as soon as you select.
Reset Filters	Revert to the default filter criteria.
Mouse-over a bar in the chart	See supplier-specific details such as total bid value in terms of rollup terms, total baseline expenditure, savings, and item fulfillment information.
(Sort by)	Apply a sorting criterion.
(Notes)	View and create notes.
(Download as PNG)	Download bid overview as a `.png` file.
(Fullscreen)	Toggle between normal and fullscreen view.

Bid Comparison - Item view

The item view section provides a graphical representation of the bid responses by suppliers primarily from the perspective of items in the sourcing event. You can apply several filters to add or remove details as necessary. The X axis of the bar chart shows supplier bid response for selected items in the filter, corresponding to the term assigned to the Y axis.

The following image shows the **Item view** section of a sourcing event.



Action	Result
Filter By	Streamline data by customising filter criteria as applicable.

Action	Result
	ⓘ Note The **Terms** filter shows only the numeric terms in the sourcing event.
Show advanced options	Get additional options for a more detailed bid comparison such as: • **Item coverage** - Compare bids based on the supplier item coverage percentage. • **Show outliers** - Identify supplier bids that fall beyond your selected item coverage range. • Manage the values selected in the **Terms** filter.
Apply	Apply the selected filter criteria.
Reset Filters	Revert to the default filter criteria.
Show Historic Price	View the historic pricing information for the selected items. This check box appears when the price term is selected. The historic price is represented with a horizontal dotted line, which is plotted against the axis to which the price term is mapped, in the graph.
Save filters	Save your preferred combination of filters. ⓘ Note You can apply the saved filter criteria to a manual scenario or an optimized out-of-the-box scenario during bid analysis. The saved filters are available in the **Scenario Maker** subsection under the **Award scenarios** section of the event.
Define the Y axis of the bar chart by selecting a value from the dropdown.	The bar chart is adjusted according to the selected value. Values in this dropdown are obtained from the **Terms** filter criteria. ⓘ Note For the term **Price**, you can get historic pricing information by selecting the **Shown Historic Price** checkbox.
Mouse-over a bar in the chart	See supplier-specific details such as item coverage, supplier point of contact, and so on.

Bid Analysis UI

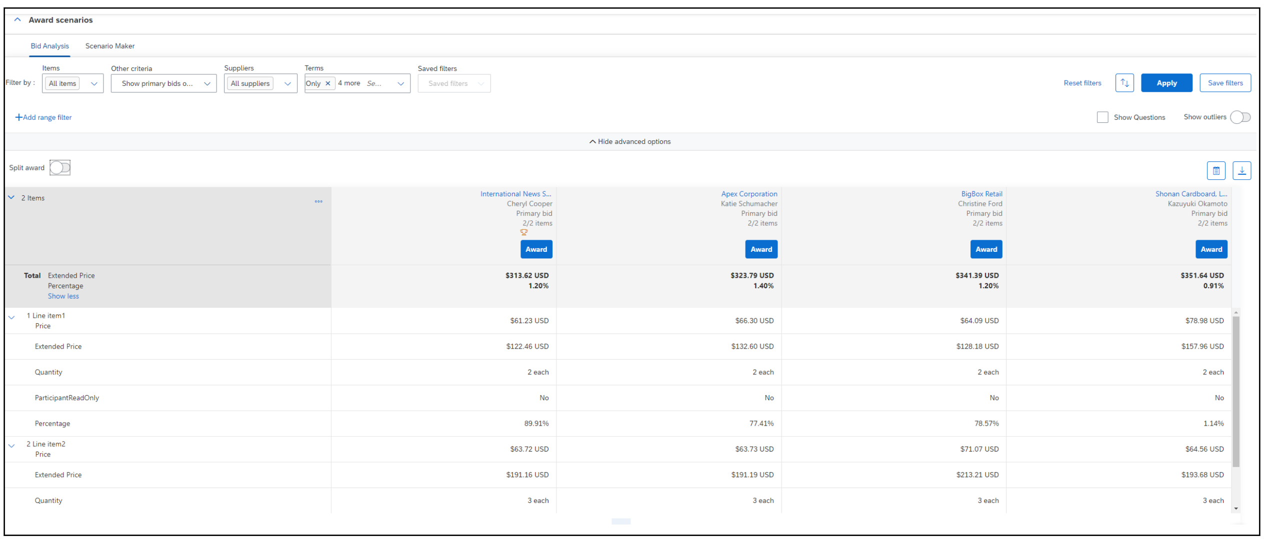
Bid Analysis provides a tabular view of bid responses from different suppliers participating in a sourcing event.

You can perform bid analysis for any event that's in the **Pending Selection**, **Awarded**, or **Completed** status. There are multiple ways to locate sourcing events depending on whether you use the classic SAP Ariba Sourcing user interface or guided sourcing, such as:

- **Sourcing** > **My Documents** >, if you're using the classic SAP Ariba Sourcing user interface. The **Bid Analysis** section is present under the **Bid Analysis** tab of the sourcing event.
- **For you** > **Recently viewed** > or **For you** > **Summary** > **Review responses** >, if you're using guided sourcing. The **Bid Analysis** section is present under the **Award Scenarios** tab of the sourcing event.

Initially, **Bid Analysis** shows data based on the default filter selection. There are several options available to help you take informed decisions for selecting the right supplier.

The following image shows the **Bid Analysis** section of a sourcing event.



Action	Result
Filter By	Streamline data by customising filter criteria as applicable.
Show advanced options	Get additional options for a more detailed bid analysis such as: • **Add Range Filter** - Further streamline bid responses by adding a range to select terms such as **Price**, **Extended Price**, and **Percentage** • **Show Questions** - Compare bids by reviewing supplier responses to questions in e sourcing event. • **Show outliers** - Identify supplier bids that fall beyond e range criteria.
Apply	Apply the selected filter criteria.
Reset Filters	Revert to the default filter criteria.

Action	Result
Save filters	Save your preferred combination of filters. ⓘ Note You can apply the saved filter criteria to a manual scenario or an optimized out-of-the-box scenario during bid analysis. The saved filters are available in the **Scenario Maker** section under the **Award scenarios** tab.
Award	Award the entire project to a single supplier by clicking the respective button under the supplier's column in the table.
Split Award	Award the project to multiple suppliers in required proportions. ⓘ Note You can define the proportions based on **Percentage** and **Quantity** terms respectively.
(Download as Excel)	Download the bid analysis table to an Excel file.

Suppliers who fulfill all the items in the sourcing event and have the lowest bid compared to other participating suppliers can be identified by the icon.

Supplier ranks are displayed based on the supplier bid values for each line item.

Perform Bid Analysis

The **Overview** and **Item view** in **Bid Comparison** and the *table view* in **Award Scenarios** > **Bid Analysis** provide you various options for comparing bids received for a sourcing event.

Comparing Bids in the Overview Tab [page 358]

Performing Bid Analysis in Item View [page 359]

Performing Bid Analysis in Table View [page 361]

Comparing Bids in the Overview Tab

Use this procedure to compare bids in the **Overveiw** tab. The **Overveiw** tab enables you to view summary of bids received for the selected event.

Context

The **Overveiw** tab appears by default when you access the bid analysis page for an event and enables you to view summary of bids received for the selected event.

Procedure

From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:

- If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
- If you are using guided sourcing: **For you** > **Recently viewed**
- If you are using guided sourcing: **For you** > **Summary** > **Review responses**

The **Bid Analysis** page appears and displays the **Overview**.

The overview contains the summary of all bids received for the event. It also provides comparison with historical data, if available, and loss or gain from the current bids in comparison with the historical data. The y axis represents the total amount and the x axis shows the suppliers.

You can select one or more options from the **Suppliers** or **Roll-up terms** dropdown list to filter bid data based on suppliers or roll-up terms.

The Suppliers list also shows any alternative bids submitted by any of the listed suppliers. If there are alternative bids by a supplier, such bids, along with the primary bid, are displayed under the supplier name in a list that can be expanded or collapsed. You can select the corresponding check box to select the bids that you want to include in the bid analysis.

Bid summary information appears when you mouse over the bar for a bid and displays information such as total bid cost, comparison with baseline and historical prices, and fulfillment of items in the selected bid. The summary also indicates whether there are supplier-added items in the selected bid.

Bars for bids that do not have 100 percent fulfillment are highlighted in a different color from the rest of the bars

Performing Bid Analysis in Item View

This procedure describes how to perform bid analysis in item view. The item view of bid analysis enables you to filter the bid data based on one or more of the following fields: items, numerical terms, and suppliers.

Context

You can either create a new filter or apply a saved filter, if available, to view bid data according to your specific requirements. If no saved filter is available or if you want to specify new criteria, you can create a new filter. Alternatively, you can apply a saved filter and edit the criteria to match your requirements.

If historic price information is available for a line item, you can choose to view that information, too. The historic price information is available only when the price term is selected for display in the **Item view** tab.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
    - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
    - If you are using guided sourcing: **For you** > **Recently viewed**
    - If you are using guided sourcing: **For you** > **Summary** > **Review responses**

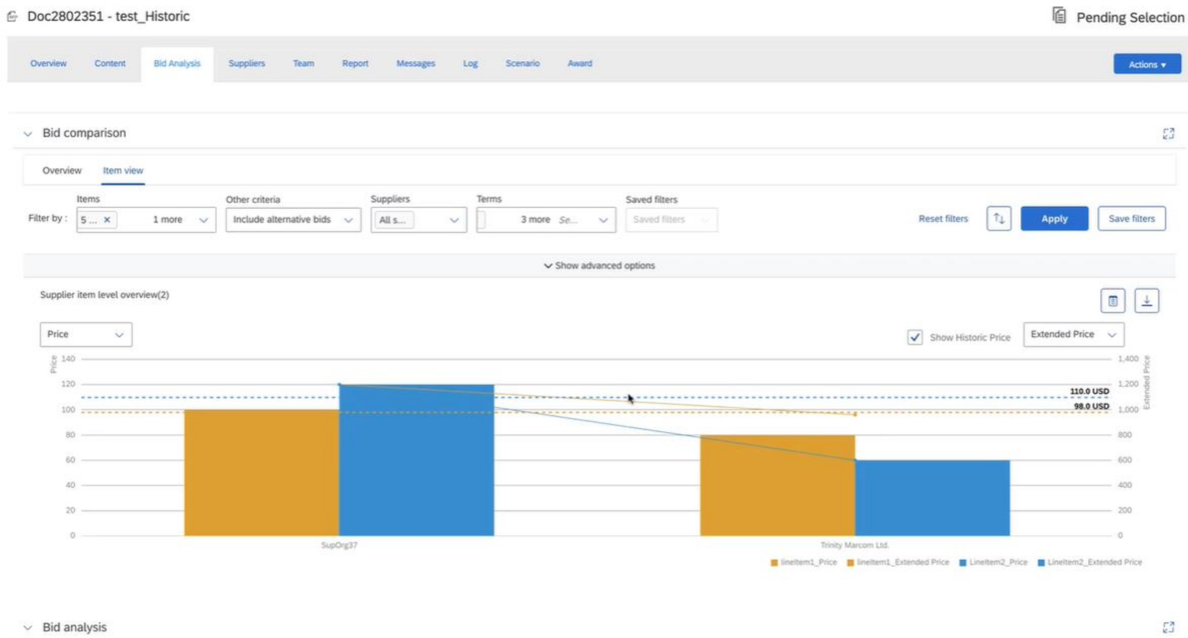
    The **Bid Analysis** page appears.
2. Click **Item view**.

    The **Item view** page appears.
3. Create a filter as explained in Creating Filters for Bid Analysis [page 363] and click **Apply.**

    Alternatively, if you want to apply a saved filter, select a filter from the **Saved filters** list and click **Apply.**. You can also modify the filtering criteria specified in the saved filter to fine tune the results as explained in Editing a Saved Filter for Bid Analysis [page 364].

    The **Item view** displays the bid data based on the applied filter.
4. If multiple numerical terms are selected in the applied filter, select the value for the y axis and the secondary y axis from the drop-down lists above the y axis and secondary y axis to view the corresponding results.
5. If you want to view the historic price information, ensure that the price term is selected either in the y axis or in the secondary y axis and select the **Show Historic Price** check box.

    The following image shows the price (y axis), extended price (secondary y axis), and historic price information for two line items. The historic price for a line item is represented with a dotted line in the same color that is used for the item bar in the graph. The historic price data is always plotted to the same axis to which the price term is mapped.



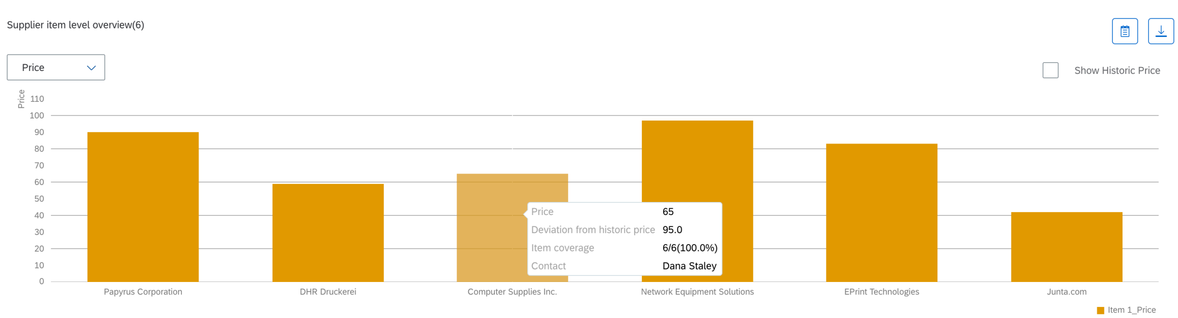
- The yellow bar represents the price for line item 1 and the blue bar represents the price for line item 2.
- The solid yellow line indicates the extended price for line item 1 and the solid blue line, the extended price for line item 2.
- The yellow dotted line indicates the historic price for line item 1 and the blue dotted line, the historic price for line item 2.

6. Optionally, mouse over any of the bars in the graph to view the following details in a popup:
   - *Price*.
   - *Deviation from historic price*.
   - *Savings*.

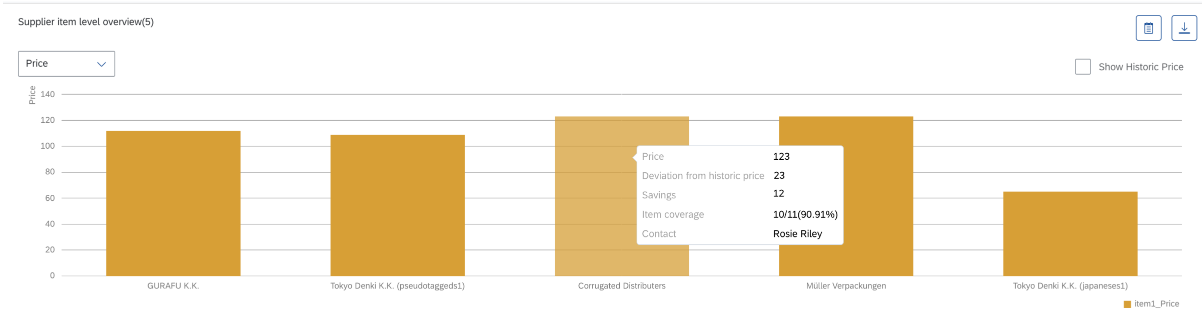
   > ⓘ Note
   >
   > Savings is shown as a separate item in the popup only if the formula used to calculate savings is different from that is used for calculating deviation from historic price.

   - **Item coverage** that shows the total number of items in the event and the number of items the supplier has submitted bids for.
   - *Contact* person in the supplier organization.

   The following image shows a popup that displays the deviation from historic price.



The following image shows a popup that displays the deviation from historic price as well as savings.



7. If you want to add notes, click the *Notes* icon in the upper right-hand corner of the item view and add notes as necessary. For more information about adding notes, see Adding Notes for Bid Analysis [page 365].

Performing Bid Analysis in Table View

This procedure describes how to perform bid analysis in table view. The table view of **Bid Analysis** enables you to filter the bid data based on one or more of the following fields: items, numerical terms, and suppliers.

Context

You can either create a new filter or apply a saved filter, if available, to view bid data according to your specific requirements. If no saved filter is available or if you want to specify new criteria, you can create a new filter. Alternatively, you can apply a saved filter and edit the criteria to match your requirements.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
    - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
    - If you are using guided sourcing: **For you** > **Recently viewed**
    - If you are using guided sourcing: **For you** > **Summary** > **Review responses**

    The event page appears.
2. Click **Award Scenarios**. Alternatively, you can scroll down to the **Award Scenarios** section.

    If you want to view bids for more than three items, **Table view** provides a better user experience.

    The **Bid Analysis** tab appears in the **Award Scenarios** section.
3. Create a filter as explained in Creating Filters for Bid Analysis [page 363] and click **Apply.**

    Alternatively, if you want to apply a saved filter, select a filter from the **Saved filters** list and click **Apply.**. You can also modify the filtering criteria specified in the saved filter to fine tune the results as explained in Editing a Saved Filter for Bid Analysis [page 364].

The **Table view** displays the bid data based on the applied filter. A maximum of 10 bids are displayed on a page. You can dynamically paginate the items in the Items table at the parent and child levels. The display and pagination of the data displayed is as follows:

- If you do not select any items from the **Items** filter, then the first page displays the first 10 items of the highest level. The next page displays the next 10 items of the same level.
- If you select items from the **Items** filter, then the table displays the first 10 out of the selected items. When you select a section, then all its child items are selected by default. Therefore, all the child items of the section are displayed in the **Items** table according to the pagination pattern. However, if you select only some of the items, then only the selected items are displayed.

The following examples explain the pagination:

- If there are 15 sections, 10 sections are displayed and clicking **Show more** displays the next 5 sections.
- If there are 5 sections and section1 contains 15 items, the 5 sections are displayed first. When you expand section1, the first 10 items in the section are displayed. Clicking **Show more** displays the next 5 items.
- If there are nested sections with the nesting order Section1, Section1.1, and Section1.1.1, each with more than 10 items, then each of the sections have the **Show more** option to see the next 10 items within that section.

4. If you want to highlight and view outliers in the bids that match the filtering criteria, click the **Show outliers** toggle button.

   The outlier items are highlighted and the deviations from the user-defined range are displayed in percentage terms.
5. If you want to add notes, click the *Notes* icon in the upper right-hand corner of the table view and add notes as necessary. For more information about adding notes, see Adding Notes for Bid Analysis [page 365].
6. If you want to download bid analysis data as an Excel file, click the *Download to Excel* icon in the upper right-hand corner of the table view.

Manage Filters in Bid Analysis

Filtering options include items, numerical terms such as price and lead time, and suppliers. You can also specify ranges for numerical terms to understand deviations and identify outliers. You can save the filters for reuse and export the filter results from table view to Excel files.

A number of predefined filters are provided in the **Other criteria** dropdown:

> ⓘ Note
>
> These options vary based on your site and event settings.

- **Can fulfill all items** to view only those suppliers that have submitted bids for all items those suppliers are invited to bid for.
- **Show primary bids only** to filter out the alternative bids and to display only the primary bids submitted by the suppliers.
- **Include alternative bids** to view all bids including the alternative bids.
- **Within budget** to view the bids that are within the baseline spend specified for the event.
- **Show bids containing supplier added items** to view bids that contain supplier-added items.

- **Show bids with no supplier added items** to filter out bids that contain supplier-added items.
- **Show preferred suppliers only** to view any those bids that are submitted by the preferred suppliers.

If you select any of these options, the other filtering options are revised to meet the criterion specified by the selected option. For example, if you select **Can fulfill all items**, only those suppliers that have submitted bids for all items that they were invited to bid for are listed in the **Suppliers** filter.

The **Items** filter contains any supplier-added items along with the items in the event and allows you to apply filters for the supplier-added items

The **Reset filters** option on the **Bid Analysis** page helps users reset all filters to their default settings. This provides a one-click option to go back to the default view of the page when you have configured multiple filtering criteria.

Creating Filters for Bid Analysis [page 363]

Editing a Saved Filter for Bid Analysis [page 364]

Creating Filters for Bid Analysis

Use this procedure to create filters for bid analysis. The item and table views of bid analysis enable you to filter the bid data based on one or more of the following fields: items, numerical and money terms, and suppliers.

Context

For numerical and money terms, you can specify a range value. You can either create a new filter or apply a saved filter, if available, to view bid data according to your specific requirements. If no saved filter is available or if you want to specify new criteria, you can create a new filter. Alternatively, you can apply a saved filter and edit the criteria to match your requirements. When you create a filter, you can save the filter for reuse.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
    - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
    - If you are using guided sourcing: **For you** > **Recently viewed**
    - If you are using guided sourcing: **For you** > **Summary** > **Review responses**

    The **Bid Analysis** page appears.
2. Click **Item view** or go to the *table view* by clicking **Award Scenarios** > **Bid Analysis**.
3. Select one or more of the following filtering options:

Items	Select the items for which you want to view the bid data.

> ⓘ Note
>
> In the **Table view**, the **Choose Values for Items** dialog box of the **Items** filtering option initially displays the first 10 of the parent items. When you click **Show more**, it displays the next 10 items of that level. If you expand a parent item, the first 10 of its child items are displayed. Clicking **Show more** at the child level displays the next 10 child items. Similarly, the **Show more** option is present in each nested level, which displays the next items at that level.
>
> However, in the **Item view**, all the items, along with their child items, are loaded together.

Terms	Select whether you want to filter the bid data based on **Range** and select one or more of the following terms: **Price**, **Discount amount**, **Extended price**, **Additional costs**, and **Lead time (days)**. **Range** option enables you to view data within a range you specify. For information about configuring the **Range** values, see Step 4. [page 364]
Suppliers	Select the suppliers whose bids you want to view. The **Choose Values for Suppliers** dialog box lists all the suppliers.

The filter criteria you selected - items, numerical or money terms, suppliers - appear on the **Bid Analysis** page.

4. To specify **Range** values for numerical terms that you selected, click the term for which you want to specify the value and configure the minimum and maximum values for the range.
5. To apply the filter on the selected event, click **Apply**.

   The bid data based on the specified filters is displayed.
6. To save the filter for reuse, click **Save filters**, enter a name for the filter, and click **Save**.

Editing a Saved Filter for Bid Analysis

Use this procedure to edit a saved filter to modify the filter criteria.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
   - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
   - If you are using guided sourcing: **For you** > **Recently viewed**
   - If you are using guided sourcing: **For you** > **Summary** > **Review responses**
2. Click **Item view** or go to the *table view* by clicking **Award Scenarios** > **Bid Analysis**.
3. From the **Saved filters** list, select the filter that you want to modify.

   The filter criteria appear in the selected view of the **Bid analysis** page.
4. To edit the filter criteria:

a. Add or delete items:
    - To add an item, select the item from the **Items** list.
    - To delete an item, click the *x* icon in the item label in the filter criteria list of items.
b. Add or edit numerical terms:
    - To add a term, select the term the terms list.
      To specify the **Range**, select one or more of the following terms: **Price**, **Discount amount**, **Extended price**, **Additional costs**, and **Lead time (days)**.
      Range option enables you to view data within a range you specify.
    - To specify **Range** values for any of the numerical terms, click the term for which you want to specify the value and specify the minimum and maximum values.
    - To delete a term label, click the *x* icon in the item label in the filter criteria list of terms.
c. Add or delete suppliers:
    - To add a supplier, select the supplier from the **Suppliers** list.
    - To delete a supplier, click the *x* icon in the supplier label in the filter criteria list of suppliers.

5. To apply the filter on the selected event, click **Apply**.

   The bid data based on the specified filters is displayed.
6. To save the filter for reuse, click **Save filters**.

Manage Notes in Bid Analysis

When you do bid analysis in the table or item view, you can add notes to the bid analysis page. You can also add notes from the **Overview** tab.

Notes are listed in the **Notes** section of the page. You can also edit and delete the notes that you added to the bid analysis page.

Adding Notes for Bid Analysis [page 365]

Viewing, Editing, and Deleting Bid Analysis Notes [page 366]

Adding Notes for Bid Analysis

Use this procedure to add notes to bid analysis from the overview, item view, or table view.

Context

You can either create a new note or edit a note associated with the selected bid analysis.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
   - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
   - If you are using guided sourcing: **For you** > **Recently viewed**
   - If you are using guided sourcing: **For you** > **Summary** > **Review responses**

   The event page appears.
2. Click **Overview** or **Item view** or go to the *table view* by clicking **Award Scenarios** > **Bid Analysis**.

   The **Overview**, **Item view**, or *table view* appears based on your selection.
3. Click the *Notes* icon at the right-hand side corner of the displayed view.

   A pop-up window lists all the notes associated with the selected event.
4. Click **Create** from the pop up window to create a new note.

   A text box appears at the bottom of the pop up window.
5. Enter the note in the text box and click **Save**.

Viewing, Editing, and Deleting Bid Analysis Notes

Use this procedure to view, edit, or delete notes added to bid analysis.

Procedure

1. From any of the following locations in the classic SAP Ariba Sourcing user interface or guided sourcing, click the pending selection event for which you want to perform bid analysis:
   - If you are using the classic SAP Ariba Sourcing user interface: **Sourcing** > **My Documents**
   - If you are using guided sourcing: **For you** > **Recently viewed**
   - If you are using guided sourcing: **For you** > **Summary** > **Review responses**

   The **Bid Analysis** page appears.
2. Click the **Notes** tab to view the notes associated with the selected bid analysis.

   Alternatively, go to the **Overview**, **Item view**, or to the *table view* from **Award Scenarios** > **Bid Analysis** and click the *Notes* icon at the right-hand side corner of the section. Click **View all** from the pop-up window that appears.

   The **Notes** section of the page lists all notes associated with the bid analysis.
3. Review the notes and if you want to edit any of the notes, click the *pencil* icon next to the note you want to edit.

   The note content becomes editable.
4. Edit the note text and click outside the text box to save the changes.

5. To delete any of the notes, click the *Delete* icon next to the note you want to delete.

   Click **Delete** in the confirmation message.

   The selected note is deleted.

Apply Bid Analysis Filters to Optimization Scenarios

Buyers using guided sourcing can apply saved bid analysis filters to out-of-the-box optimization scenarios and create manual scenarios based on bid analysis filters.

Ability to apply filters to the out-of-the-box optimization scenarios helps you customize the scenarios and narrow down the data set to meet your specific requirements and to apply the goals and constraints that are part of the optimization scenario to the filtered data set.

You can apply a saved filter to an out-of-the-box optimization scenario such as Best Bid, Best Savings, and Best bid with limited suppliers while creating the filter or editing the filter. Additionally, you can also specify the number of suppliers you want to see in the **Best bid with limited number of suppliers** scenario.

> Note
>
> You cannot apply a saved filter to the out-of-the-box optimization scenario Maximize scoring or incumbent supplier scenario.

For example, if an event contains responses from dozens of suppliers and for hundreds of items, the buyer can apply a filter that shows the bids from a few specific suppliers and for the most important items to a scenario to have better visibility into the bids and expedite the process.

Applying a Saved Filter to an Out-of-the-Box Optimization Scenario [page 367]

Creating a Manual Scenario Based on Bid Analysis Filters [page 368]

Modifying the Number of Suppliers for the Best Bid with Limited Suppliers Scenario [page 369]

Applying a Saved Filter to an Out-of-the-Box Optimization Scenario

Use this procedure to apply a saved bid analysis filter to an out-of-the-box optimization scenario.

Prerequisites

You must have either **optimization workbench admin** or **optimization workbench** user permissions to be able to use the bid analysis options.

Context

When you create a filter, you can select the out-of-the-box optimization scenario to which you want to apply the filter.

Procedure

1. In the **Save filters** dialog box that appears when you create [page 363] a filter, select the **Apply this filter to an out-of-the-box optimization scenario** check box.

   The *Select scenario* dropdown appears.
2. From the *Select scenario* dropdown, select the scenario to which you want to apply the filter and click **Save**.

   The goals and constraints from the out-of-the-box optimization scenario you selected are applied to the filtered data set to create a new scenario. The name you specified for the filter is applied to the newly-created scenario.
3. To view the newly-created scenario, go to the **Scenario maker** and click the scenario name.

   The scenario summary and details appear on the page.

Creating a Manual Scenario Based on Bid Analysis Filters

Buyers can use this procedure to create manual scenarios based on bid analysis filters.

Prerequisites

You must have either **optimization workbench admin** or **optimization workbench user** permissions to be able to use the bid analysis options.

Context

You can create a filter to fine tune the bid analysis and save that as a manual scenario.

Procedure

1. Select a pending selection, awarded, or completed event for which you want to perform bid analysis.
2. From the bid analysis page for the selected event, specify the filtering criteria.

   For information about creating filters, see Creating Filters for Bid Analysis [page 363].

3. After you select the filtering criteria, click **Save filter**.

   The **Save filters** dialog box appears.
4. In the **Save filters** dialog box, enter a name for the filter and select the **Apply this filter to a new scenario** check box.

   The name you enter for the filter is also applied to the scenario.
5. Click **Save**.

   You can go to the **Scenario maker** page and click the name of the newly-created scenario to view the details of the scenario.

Modifying the Number of Suppliers for the Best Bid with Limited Suppliers Scenario

Buyers using guided sourcing can use this procedure to specify the number of suppliers that you want to view in the **Best bid with limited suppliers** scenario.

Prerequisites

You must have either **optimization workbench admin** or **optimization workbench user** permissions to be able to use the bid analysis options.

Context

When you create a filter, you can select the out-of-the-box optimization scenario **Best bid with limited suppliers** and modify the default value, **2**, for the number of suppliers to be included in the scenario.

Procedure

1. In the **Save filter** dialog box that appears when you create [page 363] a filter, select the **Apply this filter to an existing scenario** check box.

   The *Select scenario* dropdown list appears.
2. From the *Select scenario* dropdown list, select the **Best bid with limited suppliers** scenario.
   The **Maximum number of suppliers** field appears. The default value, **2**, is displayed in the field.
3. In the **Maximum number of suppliers** field, enter the number of suppliers you want to include in the scenario.

   > ⓘ Note
   >
   > You must enter a whole number not lesser than 1 and not greater than the total number of suppliers selected in the **Suppliers** field of the filter.

4. To view the newly-created scenario, go to the **Scenario maker** and click the scenario name.

   The scenario summary and details appear on the page.

View Cost Breakdown Information from Bid Analysis

From the bid analysis page of the classic SAP Ariba Sourcing user interface or the guided sourcing user interface, you can click the hyperlink associated with a cost breakdown term to view the cost breakdown details. Cost breakdown information is also available in the item view and in a new tab, **Cost breakdown**.

The cost breakdown terms are listed in the **Terms** dropdown list of filters.

From the **Cost breakdown** page that appears when you click the cost breakdown term, you can select the supplier and line item for which you want to view the cost breakdown information. The cost breakdown information on this page is displayed as read-only. You can also apply range filters for the cost breakdown data.

The **Cost breakdown** tab that appears in the **Bid Comparison** section provides a graphical view of the cost groups and enables you to filter the cost group data based on line items or suppliers. Only one line item can be selected at a time. Note that cost breakdown support in bid analysis is limited to material items.

Viewing the Cost Breakdown Information from the Bid Analysis UI

This procedure describes how to view the cost breakdown information from the **Bid Analysis** UI. You can click the cost breakdown term in the bid analysis table to view the cost breakdown details. You can also view a graphic representation of the cost breakdown details from the **Cost breakdown** tab of the **Bid comparison** section.

Prerequisites

You must have either optimization workbench admin or optimization workbench user permissions.

Context

The hyperlink associated with the cost breakdown term enables you to view the cost breakdown details in read-only mode. You can filter the details based on the line item or supplier to which the term is associated.

You can view a graphical representation of the cost breakdown term, along with the cost information, from the **Cost breakdown** tab. The graph view also provides options for filtering the cost breakdown details based on a line item or suppliers.

Procedure

1. From any of the following locations in the SAP Ariba Sourcing user interface, click the pending selection event for which you want to perform bid analysis:
   - **For you** > **Recently viewed**
   - **For you** > **Summary** > **Review responses**
   - **Sourcing** > **My Documents**

   The **Bid Analysis** page appears.
2. From the **Bid Analysis** page, perform any of the following tasks to view the cost breakdown information:
   - Click **Table view** and click the hyperlink to the cost breakdown term for which you want to view the details. The **Cost breakdown** page displays the cost groups. You can filter the cost group information based on line items or suppliers for which you want to view the cost breakdown details.
   - Click **Graph view** and from the **Terms** list, select the cost breakdown term for which want to view the graph.
   - Click the **Cost breakdown** tab in the **Bid Comparison** section and select the line item and suppliers based on which you want to view the cost breakdown graph.

   > Note
   >
   > You can select only one line item at a time.

How to Export Customer Data for a Specific Date Range for Bid Analysis

You can export customer data for the selected date range in JSON format and download the file into the Downloads folder.

Prerequisites

The following prerequisites must be met to export bid analysis data:

- The parameter `Application.ACM.EnableBidAnalysisTab` must be enabled.
- Users must belong to the **Optimization Workbench Admin** or **Customer Administrator** group.

Context

You can export the following customer data:

- **Filters**: These are the filters created and saved by customers on the bid analysis page to view bid data according to their specific requirement.
- **Optimization scenarios**: These are the optimization scenarios created from guided sourcing RFP events.
- **Notes**: These are the notes added by customers on the bid analysis page.

For example, consider the event present on a given date contains the note Note1, the filter BestBid, and the optimization scenario BestScenario containing two item groups. When you export data for the given date, the file **ExportedCustomerData.json** contains the following data about the event:

Sample Code


```
{
                        "eventId" : "Doc1234567",
                        "notes" : [ {
                        "userId" : "johnd",
                        "note" : "Note1",
                        "timeUpdatedInMillis" : 1661419217304
                        } ],
                        "filters" : [ {
                        "filterName" : "BestBid",
                        "timeUpdatedInMillis" : 1661419171180
                        },],
                        "scenarios" : [ {
                        "s4ScenarioId" : "ID5678912",
                        "scenarioName" : "BestScenario",
                        "itemGroups" : [ "Item group 1", "Item group 2" ]
                        }
```


Procedure

1. On the SAP Ariba Administrator page, click **Optimization Workbench Manager** > **Export Data**.

   The **Export Data** page opens.
2. Select the date range for which you want to export the data.
3. Click **Export**.

Results

The data is exported in a JSON file to the Downloads folder.

Creating Sourcing Event Data Using Excel

General Considerations for Importing and Exporting Sourcing Event Data

SAP Ariba Sourcing allows you to import sourcing event data from and export data to Microsoft Excel spreadsheets. This feature helps you to enter a large volume of data quickly or save event information outside of SAP Ariba Sourcing, or to collaborate with colleagues. Data that you can import and export includes content such as event rules, lots, and line items, supplier invitations, attachments, exchange rates, pre-grades, questions, and terms. Event participants can export event data, formulate their responses off line and then submit their response in the Microsoft Excel spreadsheet.

When viewing and editing the contents of a large-capacity RFP, you use Microsoft Excel spreadsheets. For information about working with large-capacity RFPs, see Using Large-Capacity RFPs [page 508].

Two ways to approach importing data into SAP Ariba Sourcing

There are two basic ways to approach importing data:

1. If all you want to do is import line items and sections, use the Simple Excel Import described in Adding Event Line Items and Sections Using Simplified Excel Import [page 375]. This is the fastest method. However, take note of these limitations [page 375].
2. If you want to create a more complex event, determine whether you already have a similar event that you can use as a base. For example, do you have an existing event with similar content (line items, sections, lots, terms, requirements, or questions), participants, or rule settings? If so, SAP Ariba recommends that you generate an Excel document that you can use as a base, by creating an event with the elements you want and exporting its contents to Excel.
   If the event that you are using as a base has already been published, open the event and navigate to the event monitoring user interface. Choose **Actions** > **Document** > **Excel Export**.

   > ⓘ Note
   >
   > For more information about exporting data from a published event, see Exporting Sourcing Event Projects [page 407].

If the event that you are using as a base has not been published, open the event, navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.

> ⓘ Note
>
> The **Import Content from Excel** page includes an option to export event information.

If you don't have an event that you can use as a base, see Importing Event Data from Microsoft Excel [page 383], About the Excel Worksheets Used to Import Data into Events [page 377], and Importing Sourcing Event Data [page 383].

Importing Data from an External System

You may write a program or script to extract data from another database and create an Excel spreadsheet for import. In that case, SAP Ariba recommends that you export the contents of a sourcing event [page 407] to create a spreadsheet as a model for your program to generate.

Improving Import Performance for Large Files with Formulas

An administrator for your site can set the **Validate formulas only within a batch when importing event content from Excel** (`Application.AQS.RFX.ExcelImport.PartialDataCommitByBatchValidation`) parameter, which can improve performance when importing event content with a large number of items that use terms with formulas.

Related Information

Validate formulas only within a batch when importing event content from Excel [page 583]
About the Excel Worksheets Used to Import Data into Events [page 377]
Rules and Guidelines for Editing Excel Event Contents [page 379]
Exporting Sourcing Event Projects [page 407]
Creating Event Sections in Microsoft Excel [page 386]
Creating Event Table Sections in Microsoft Excel [page 388]
Creating Event Questions in Microsoft Excel [page 389]
Creating Event Requirements in Microsoft Excel [page 391]
Creating Event Lots in Microsoft Excel [page 392]
Creating Event Line Items in Microsoft Excel [page 394]
Creating Event Item Term Definitions in Microsoft Excel [page 395]
Importing Event Data from Microsoft Excel [page 383]
Exporting Event User Interface Tables to Microsoft Excel [page 410]
Show Unspecified for empty or invalid term value

Adding Event Line Items and Sections Using Simplified Excel Import

If you only want to import line items and sections to an RFP event, this procedure describes how to use the **Simplified Excel Import** feature to quickly add sections and line items, including material master data items, to an RFP event from a Microsoft Excel file. You can specify term values for line items, such as quantity and price. You can also specify values for custom terms.

Context

The **Simplified Excel Import** can be used to add or edit line items, or replace all existing line items in the event with those in the Excel file. In a draft event, you can choose to update the existing line items or replace them with the items in the Excel file. In a published event, you can only add new items, but cannot replace the existing ones.

> **Restriction**
>
> - You can only import line items and sections.
> - You cannot add terms to line items using this feature. To add a term to line items, create a placeholder line item with the term using the interactive user interface, then export a simplified Excel template with the new term.
> - You cannot use the simplified Excel file as data for the Import Sourcing Event web service.
> - When you import questions using Simplified Excel Import, if you update a question in a way that the associated condition (if any) is no longer valid, then the condition gets deleted. You must recreate the conditions in the event.

The **Simplified Excel Import** operation includes a step to export a template with the current contents of your event. The template contains just one worksheet that you fill in, **LineItems**, and an instruction sheet (**Design Instructions**). **LineItems** 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.

The following is a simplified **LineItems** worksheet with help text rows removed. It contains the current items: **Paint 5 Liters** and 3 line items for different paint colors (**Red**, **Blue**, **Yellow**). The fourth line item for paint color **Orange** is added, so the **System ID** is blank.. The **Number** column defines a hierarchy, with the **Paint 5 Liters** section (Number 1) at the top and the line items for the paint colors nested below the section (Number values 1.1, 1.2, 1.3, and 1.4).

System Id	* Type	* Number	* Item Name	Description	Commodity	Currency	Region	Delete	Item ID	ERP System ID	Price	* Quantity	* UOM. Quantity
2831911	Section	1	Paint 5 Litres										
2831912	Line Item	1.1	Red		31211506	USD	EU	Yes				5000	EA
2831913	Line Item	1.2	Blue		31211506	USD	EU					5000	EA
2831914	Line Item	1.3	Yellow		31211506	USD	EU					5000	EA
	Line Item	1.4	Orange		31211506	USD	EU					5000	EA

If your site has the site configuration parameter `Application.AQS.SimplifiedExcelContent.LookUp.Enabled` set to `Yes`, the Excel template also contains a **LookUp** worksheet with commodity and region descriptions and ID values you can use for the **Commodity** and **Region** columns in the **LineItems** worksheet.

Procedure

1. Create or open the draft or published SAP Ariba Sourcing event that you want to update.
2. Navigate to the **Content** page of the event.
3. Add a sample line item that contains all terms (including custom terms) you want to use for all line items.
4. Click **Simplified Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
5. In Step 1 of the **Import Content from Excel** page, click **Click here to open RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
6. 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 in the **LineItems** worksheet.

    > ⓘ Note
    >
    > - Do not remove the blue header row.
    > - Leave the **System ID** blank for new line items.
    > - To delete a row, type **Yes** in the **Delete** column.
    > - 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 columns for the remaining ERP term values blank (such as Plant) and have SAP Ariba Sourcing copy the remaining ERP term values from material master data. If you choose to specify ERP term values, SAP Ariba Sourcing validates only Plant and Base Unit of Measure (UOM) values against the material master data.
    >   - 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.
    > - If a line item contains formula terms, SAP Ariba Sourcing identifies such terms in the simplified Excel export by adding **Fx** in the corresponding cells. Similarly, if you want to add formula terms while adding a line item by using simplified Excel import, you can either add **Fx** in the respective cells or leave the cells blank. If you do not want to add a formula term for any of the line items, you can mark the corresponding cells as `N/A`.

7. Save your changes.
8. Return to the **Import Content from Excel** page for simplified Excel imports: Navigate to the **Content** page for the event and click **Simplified Excel Import** at the bottom of the page.
9. In Step 3 of the **Import Content from Excel** page, choose either **Add or Edit Event Content** or **Replace Event Content**.
10. In Step 4 of the **Import Content from Excel** page, specify the location of your edited Excel document.
11. In Step 5 of the **Import Content from Excel** page, click **Import**.
12. Wait for the import to complete. Check for errors or warnings.

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.

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 what items or terms had errors. You can correct the errors in the Excel document and repeat the import operation, or manually add the values in the user interface.

About the Excel Worksheets Used to Import Data into Events

> ⓘ Note
>
> The following information is for the standard **Excel Import** feature. If you are using the **Simplified Excel Import** feature, see Adding Event Line Items and Sections Using Simplified Excel Import [page 375].

A typical sourcing event contains the worksheets shown in the list below, starting with **Design Instructions**.

To access these worksheets [page 383], open the sourcing project and navigate to the **Content** page. Then, click the **Excel Import** button at the bottom of the page to open the **Import Content from Excel** page.

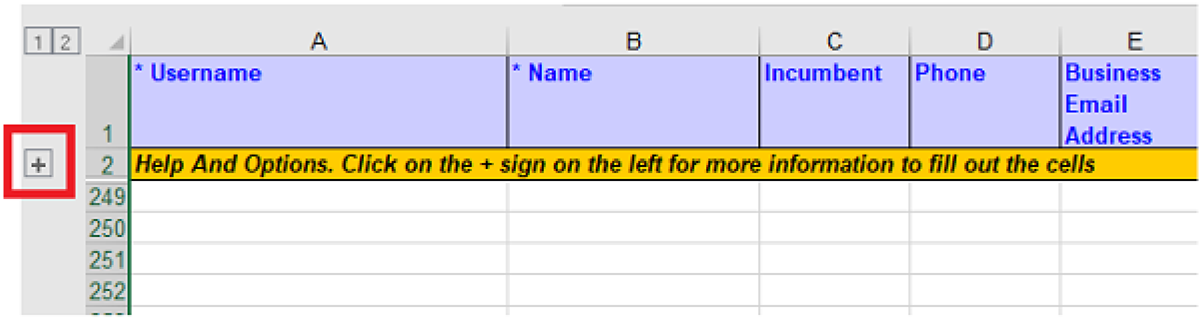
The worksheets appear as tabs in an Excel spreadsheet. Which worksheets you see depends on the items you select on the **Import Content from Excel** page.

- If you select **Content**, you see tabs for **Content**, **Pricing**, **Terms**, and **Conditions**.
- If you select **Participants**, you see the **Participants** tab.
- If you select **Rules**, you see the **Rules** tab.
- If you select **Currency Conversion** and the event is a multiple currency event (the event rule **Allow participants to select bidding currency** is set to **Yes**), you see the **Currency Conversion** tab.

> ⓘ Note
>
> - You cannot import team members.
> - Make sure you do not exceed the content size limits [page 26] when building your spreadsheet.

Help

When you open the worksheets, you can find out more about the contents by clicking the plus sign (+) on the left:



The plus sign expands the spreadsheet to add text under each column describing the allowed values and default initial value of the column.

Excel Worksheet Descriptions

Following are descriptions of worksheets contained in typical auction projects.

- **Design Instructions** – This worksheet contains general instructions for filling out the spreadsheet. This worksheet is ignored during import.
- **Content** – The Content worksheet includes non-pricing content types such as questions, sections, table sections, and requirements. Do not edit the system ID column.
- **Pricing** – Use the Pricing worksheet for the lot and line item content types. SAP Ariba Sourcing separates lots and line items into a separate worksheet due to the number of columns associated with pricing. The sections listed in the **Content** tab are also shown on this worksheet so that any child pricing elements can be shown in their proper hierarchy. If you need to create a new term for a line item, make sure it is defined on the **Terms** tab.
- **Terms** – This worksheet lists all the terms defined in your event and all the details of their definition such as acceptable values, decimal places, and formulas. You can create new terms.
- **Participants** – This worksheet lists the user names and names of the participants in this SAP Ariba Sourcing event. In some places, participants are also described as “suppliers.” You can import new event participants. The rules for participant names and organizations that do or do not exist in your database are as follows:
  - If the participant exists but the organization does not, you get an error.
  - If the participant and organization exist and they match, the participant is invited to the event.
  - If the participant and organization exist but do not match, the organization is ignored and the participant is invited to the event.
  - If the participant is new but the organization exists, the participant is mapped to the organization and invited to the event.
  - If the participant and the organization are both new, they are both created in the system and the participant is invited to the event.

> ⚠ Restriction
>
> You cannot invite other users (non-participants) to the event using Excel import. Excel import is available only while working with a draft version of the event. After an event has been published, the **Excel Import** button does not appear.

- **Item Participants** – This worksheet has a column for each participant user name. Each row is an item in the event showing whether the participant has been invited to respond.
- **Rules** – This worksheet lists each rule that is defined for this event and the rule value or setting. You can set values, but you cannot create a new rule. If you export from a project created with a certain template, be sure to import to a project created with the same template. Templates determine which rules are present. The import software ignores rules in the spreadsheet that are not in the project you are importing to.
- **Participant Initial Values** – For each participant, the rows for line items show the initial bid set for each participant, if these values are to be different from the event initial value. The participants must match those on the Participants and Item Participants tabs.
- **Currency Conversion** –This worksheet lists the conversion rate for all the currencies in your SAP Ariba system converted to the currency for this event. You can change the exchange rates, but you cannot add currencies that are not defined in your SAP Ariba Sourcing solution.

Attachments

The spreadsheet you import can reference attachments. You can import these attachments in a ZIP file when you import the spreadsheet. For example, the **Terms** worksheet contains a column titled **Reference Documents**, where you can enter the file name of a file you intend to attach. There is also a **Reference Documents** column in the **Content** worksheet.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]
Rules and Guidelines for Editing Excel Event Contents [page 379]
Importing Event Data from Microsoft Excel [page 383]

Rules and Guidelines for Editing Excel Event Contents

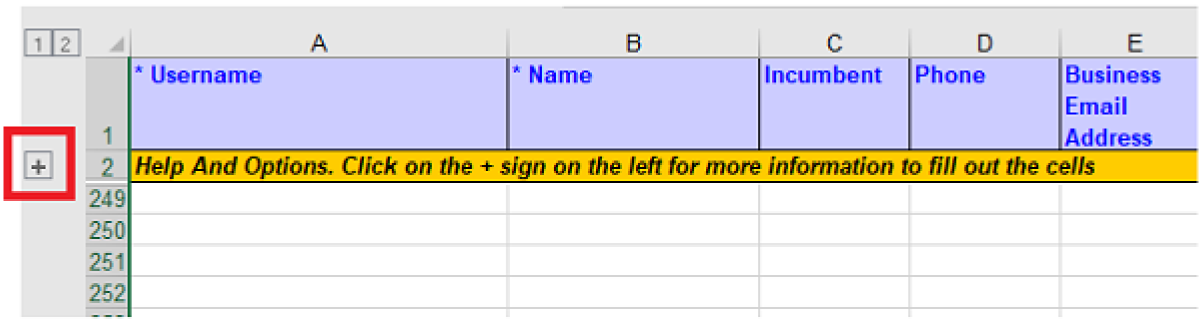
SAP Ariba Sourcing validates the data in the imported Excel document. For example, if you accidentally enter alphabetic characters into a **Number** column, SAP Ariba Sourcing displays an error message when you import it.

Keep the following rules and guidelines in mind when entering data into a Microsoft Excel document for event data.

> ⓘ Note
>
> The following information is for the standard **Excel Import** feature. If you are using the **Simplified Excel Import** feature, see Adding Event Line Items and Sections Using Simplified Excel Import [page 375].

Help

When you open the worksheets, you can find out more about the contents by clicking the plus sign (+) on the left:



The plus sign expands the spreadsheet to add text under each column describing the allowed values and default initial value of the column.

Required Data

- **Do not remove or edit rows or columns that are blue**.
- SAP Ariba Sourcing maps data into the input fields according to these column names. If you change the column names, the data cannot be recognized and is ignored.
- An asterisk in a column heading (*) means that data is required for all cells in that column. Columns without asterisks are for optional information and you can use them as needed.
- Do not delete columns for standard terms, such as **Price**.
- Some columns in the template accept only specific values. For example, the **Type** column accepts only the names of defined content types. If you enter other text in this column, you get an error message when you try to import the template.

Optional Data

- If you do not enter a value for an optional column, SAP Ariba Sourcing provides a default. This default is the same default value as that displayed in the user interface.
- You can remove columns that are not required from the template.
- Terms that are defined in the event template do not have to be redefined in Microsoft Excel in order to import.

- Terms that are not defined in the Attribute Details sheet and do not have the default value of the term set under the term column are imported as non-negotiable terms.

System Id

The **System Id** column provides a unique identifier (system ID) for each line of content. SAP Ariba Sourcing uses the system ID to update existing items. It works as follows:

- When imported content has a **System Id**, the system searches the project for content with that ID and updates it with the revised values, if any.
- If you are adding new content, leave the **System Id** column blank. Content with no **System Id** is added to the project, so if you delete the system ID for an existing item, selecting **Add/Edit to Event Content** when you import the Excel document creates another copy of the item.
- If you select **Replace Event Content** when you import the Excel document, any content, suppliers, and other specifications in the event are removed and replaced with the contents of the Excel document.

Number

The values in the **Number** column indicate how items are organized in SAP Ariba Sourcing.

- If you leave the **Number** column blank or provide an invalid number, SAP Ariba Sourcing adds those sections, items, questions, and lots at the base level of the event, assigning ascending whole numbers. After you import the Excel data, you can drag and drop or copy and paste the content to order it as you like in the interactive interface.
- You can define a line item hierarchy or table section columns using a number system with a period (`.`) separating the hierarchy levels or column values. For example, the line item number `1.2.9` indicates the ninth item in the second subgroup of the first group.
- By default, Microsoft Excel removes trailing zeros from numbers with decimal points. For example, Excel removes the trailing `0` in `1.10`, so the value becomes `1.1`. In the **Number** column, you want Microsoft Excel to treat `1.10` as text instead of a number. You can achieve this in one of the following ways:
  - When entering decimal item numbers that end in `0`, type an apostrophe first: Microsoft Excel treats the number as a text entry. For example, if you want the item number `1.10`, type `‘1.10`.
  - Format the entire column of numbers as text, by choosing the column and clicking **Format** > **Cells**. Click the **Number** tab, and in the Category section, choose **Text** and click **OK**. All data entered in the column is treated as text.

Tables

- For table sections, each cell is displayed in a separate row in the spreadsheet. For questions, the value in the **Name** column is used to identify all columns belonging to the same table row.
- For requirements, the **Table Requirement Line Number** is used to display requirements in a table section in the same row, since requirements can have different Name values for each column in a table section row.

Two ways to approach importing data into SAP Ariba Sourcing

There are two basic ways to approach importing data:

1. If all you want to do is import line items and sections, use the Simple Excel Import described in Adding Event Line Items and Sections Using Simplified Excel Import [page 375]. This is the fastest method. However, take note of these limitations [page 375].
2. If you want to create a more complex event, determine whether you already have a similar event that you can use as a base. For example, do you have an existing event with similar content (line items, sections, lots, terms, requirements, or questions), participants, or rule settings? If so, SAP Ariba recommends that you generate an Excel document that you can use as a base, by creating an event with the elements you want and exporting its contents to Excel.
   If the event that you are using as a base has already been published, open the event and navigate to the event monitoring user interface. Choose **Actions** > **Document** > **Excel Export**.

   > ⓘ Note
   >
   > For more information about exporting data from a published event, see Exporting Sourcing Event Projects [page 407].

   If the event that you are using as a base has not been published, open the event, navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.

   > ⓘ Note
   >
   > The **Import Content from Excel** page includes an option to export event information.

   If you don't have an event that you can use as a base, see Importing Event Data from Microsoft Excel [page 383], About the Excel Worksheets Used to Import Data into Events [page 377], and Importing Sourcing Event Data [page 383].

Related Information

About the Excel Worksheets Used to Import Data into Events [page 377]
Event Content Limits [page 26]

Importing Sourcing Event Data

Two ways to approach importing data into SAP Ariba Sourcing

There are two basic ways to approach importing data:

1. If all you want to do is import line items and sections, use the Simple Excel Import described in Adding Event Line Items and Sections Using Simplified Excel Import [page 375]. This is the fastest method. However, take note of these limitations [page 375].
2. If you want to create a more complex event, determine whether you already have a similar event that you can use as a base. For example, do you have an existing event with similar content (line items, sections, lots, terms, requirements, or questions), participants, or rule settings? If so, SAP Ariba recommends that you generate an Excel document that you can use as a base, by creating an event with the elements you want and exporting its contents to Excel.
   If the event that you are using as a base has already been published, open the event and navigate to the event monitoring user interface. Choose **Actions** > **Document** > **Excel Export**.

   > Note
   >
   > For more information about exporting data from a published event, see Exporting Sourcing Event Projects [page 407].

   If the event that you are using as a base has not been published, open the event, navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.

   > Note
   >
   > The **Import Content from Excel** page includes an option to export event information.

   If you don't have an event that you can use as a base, see Importing Event Data from Microsoft Excel [page 383], About the Excel Worksheets Used to Import Data into Events [page 377], and Importing Sourcing Event Data [page 383].

Importing Event Data from Microsoft Excel

Use this procedure to import event data from Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Excel import functionality is only available while working with a draft version of the event. After an event has been published, the **Excel Import** button does not appear.

If you are trying to import data from an event that has already been published, you need to first export the data from that event, and then import it into a new event. From the event monitoring interface for the published event, choose **Actions** > **Document** > **Excel Export** to export the data.

> **Note**
>
> For more information, see Exporting Sourcing Event Projects [page 407].

Context

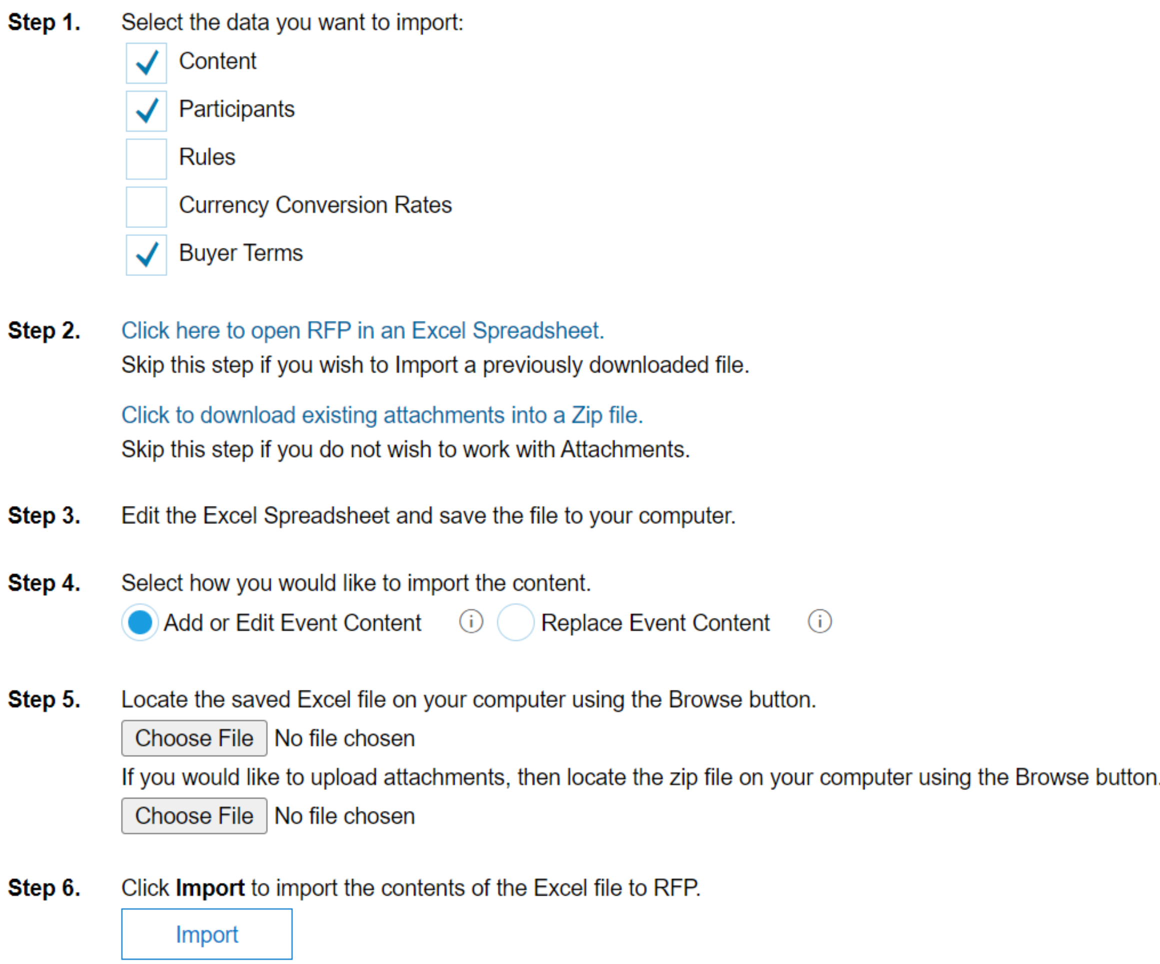
This section steps you through a typical Microsoft Excel Import process.

> **Note**
>
> The following information is for the standard **Excel Import** feature. If you are using the **Simplified Excel Import** feature, see Adding Event Line Items and Sections Using Simplified Excel Import [page 375].

Procedure

1. Create a sourcing event project into which you want to import event data.
2. Navigate to either the **Suppliers** or the **Content** page of the project.
3. Click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.

   The **Import Content from Excel** page enables both importing from and exporting to Microsoft Excel spreadsheets.



4. In Step 1 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
5. 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.
> - If you are adding entries for material master items, see the considerations for material master items [page 376].
> - For additional rules and guidelines, see Rules and Guidelines for Editing Excel Event Contents [page 379].

6. Save your changes.
7. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
8. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**
9. Click **Done**, on the right, to return to the project.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]
About the Excel Worksheets Used to Import Data into Events [page 377]
Rules and Guidelines for Editing Excel Event Contents [page 379]
Creating Event Sections in Microsoft Excel [page 386]
Creating Event Table Sections in Microsoft Excel [page 388]
Creating Event Questions in Microsoft Excel [page 389]
Creating Event Requirements in Microsoft Excel [page 391]
Creating Event Lots in Microsoft Excel [page 392]
Creating Event Line Items in Microsoft Excel [page 394]
Creating Event Item Term Definitions in Microsoft Excel [page 395]
Importing Event Currency Conversion Rates from Microsoft Excel [page 402]
Importing Event Conditions from Microsoft Excel [page 403]

Creating Event Sections in Microsoft Excel

Use this procedure to create event sections in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create sections by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:
   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
2. Fill out a row on this worksheet with information to create one section.
3. In the **Number** column, enter a number.
4. In the **Type** column, enter `Section`.
5. In the **Name** column, enter the name of the section. Other columns in the template accept any value. The name column is one of those. You can name the section whatever you like.
6. Enter the description of the section. You can enter any description.
7. In the **Answer Type** and **Allowed Values** columns, enter nothing; sections do not accept answers.

   If the section is an envelope, there is also a column for the envelope number. You can have more than one section in an envelope.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Creating Event Table Sections in Microsoft Excel

Use this procedure to create event table sections in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create table sections by entering information into the Microsoft Excel event template.

Each cell in a table section requires a separate row:

- A question row is identified by the value in the **Name** column, all lines in the spreadsheet with the same Name value are displayed in one row. Enter the column values in the **Table Section** column.
- A requirement row is identified by the **Table Requirement Line Number**, which is an integer value. All lines in the spreadsheet with the same **Table Requirement Line Number** are displayed in one row in the user interface. If you enter different **Table Requirement Line Number** values, then the requirements are displayed in different rows for each column. Enter the column values in the **Table Section** column.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.

2. Fill out a row on this worksheet with information to create one section.
3. In the **Number** column, enter a number.
4. In the **Type** column, enter `Table Section`.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]
Creating Event Sections in Microsoft Excel [page 386]

Creating Event Questions in Microsoft Excel

Use this procedure to create event questions in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create questions by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
2. In the **Number** column, enter a number. You might want to nest the question inside a section. To do that, specify a hierarchical number. For example, specifying 2.1 causes SAP Ariba Sourcing to nest the question under section 2, assuming that you created a section with number 2.
3. In the **Type** column, enter `Question`.
4. In the **Name** column, enter the question.
5. Leave the **Description** column blank.
6. Enter the answer type. See the Help page linked to from the **Import Content from Excel** page for a list of all the acceptable answers. For example, you might enter `Yes / No`.
7. In the **Allowed Values** column:

   - To allow any value, leave the cell blank.
   - To allow a limited range, enter the endpoints separated by a tilde character, for example, to allow numbers between 0 and 100, enter `0~100`.
   - To allow a list of choices, enter the choices you want to allow, separated by pipe characters: `1|2|3|4`.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Creating Event Requirements in Microsoft Excel

Use this procedure to create event requirements in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create requirements by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:
   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
2. In the **Number** column, enter a number. You might want to nest the requirement inside a section. To do that, specify a hierarchical number. For example, specifying 2.2 causes SAP Ariba Sourcing to nest the requirement under section 2, assuming that you created a section with number 2.
3. In the **Type** column, enter `Requirement`.
4. In the **Name** column, enter the text of the requirement. For example: `You must agree to the General Commercial Terms`.

5. Leave the **Description** column blank.
6. Leave the **Answer Type** column blank.
7. Leave the **Default** column blank.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Creating Event Lots in Microsoft Excel

Use this procedure to create event lots in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create lots by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
2. Choose the **Pricing** worksheet.
3. In the **Number** column, enter a number. Although the content and pricing information are on different worksheets, when you import the template, SAP Ariba Sourcing merges the two together. Be sure not to specify numbers that you have already used on the content worksheet. You use the number column to describe how you want the rows in both worksheets of the Microsoft Excel template to be merged and organized when you import the template.
4. In the **Type** column, enter the type of lot to create. Choose from **Biddable Lot**, **Basket Lot**, and **Basket Lot (No Items)**.
5. Enter the name of the lot.
6. Enter an optional description for the lot.
7. The remainder of the columns allow you to specify optional pricing information. Entering the Price or the Quantity in Microsoft Excel tends to be faster than using the SAP Ariba Sourcing web interface.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Event Lots and Line Items [page 85]

Creating Event Line Items in Microsoft Excel

Use this procedure to creating event line items in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create line items by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
2. Choose the **Pricing** worksheet.
3. In the **Number** column, enter a number. You might want to nest a line item inside of a lot. To do that, specify a hierarchical number. For example, specifying 3.1 causes SAP Ariba Sourcing to nest the line item under lot 3, assuming that you created a lot with number 3.
4. In the **Type** column, enter `Line Item`.
5. Enter the name of the line item.
6. Leave the **Description** column blank.

   The remainder of the columns allow you to specify optional pricing information. Entering the price or the quantity in Microsoft Excel tends to be faster than using the application's web interface.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Creating Event Item Term Definitions in Microsoft Excel

Use this procedure to create event item term definitions in Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The following procedure tells you how to create item term definitions by entering information into the Microsoft Excel event template.

Procedure

1. Open the **Content** worksheet of a sourcing event template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

To create an Excel import template from an **unpublished** sourcing event:

a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
b. Click **Excel Import** at the bottom of the page.
c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.

2. Choose the **Pricing** worksheet.
3. Add a column to the worksheet.
4. You can define the detailed attribute definition in the **Attribute Details** sheet and set the default value of the term under the term column.

   If the term has been applied to multiple items, you only need to define the attribute definition in the **Attribute Details** sheet once. If the attribute does not apply to specific item(s), then enter `Not Applicable` in the item term column.

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]

Importing Event Participants from Microsoft Excel

Use this procedure to import event participants from Microsoft Excel.

Prerequisites

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)

Context

You use the **Import Content from Excel** page to import and export Microsoft Excel spreadsheets.

Procedure

1. Create a sourcing event project into which you want to import event participants.
2. Open the **Participants** worksheet of an Excel import template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Participants**. You can optionally select additional data categories to add or edit (**Contents** or **Rules**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
3. To add a participant already configured as a supplier user:
   a. On the **Participants** worksheet, enter the **User ID** in the **User Name** column.
   b. Enter the user name in the **Name** column.
   c. **Optional:** In the **Incumbent** column, specify **Yes** or **No**.

   If your site uses supplier organizations, you can also use Excel imports to create new supplier organizations if you can complete all of the required information about the organizations. If your site includes SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), new suppliers must be created using supplier requests before inviting them to events.
4. Save your changes.

5. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
6. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Related Information

About Inviting Event Participants [page 52]

Importing Item Participants from Microsoft Excel

Use this procedure to import item participants from Microsoft Excel.

Prerequisites

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)

Context

You use the **Item Participants** page from a Microsoft Excel spreadsheet to invite or uninvite event participants for individual lots or items.

Procedure

1. Create a sourcing event project into which you want to import item participants.
2. **Optional:** Invite participants to the event.
3. Open the **Item Participants** worksheet of an Excel import template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:
   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Participants**. You can optionally select additional data categories to add or edit (**Contents** or **Rules**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
4. On the **Item Participants** worksheet,
   a. Go to the column of the participant you want to invite or uninvite. Find the row for the item and change the value from **Invited** to **Uninvited** or vice versa.

   You can also invite a participant for an item who is not already invited to the event by adding the user to the **Participants** worksheet [page 396].
5. Save your changes.
6. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
7. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Importing Participant-Specific Initial Values from Microsoft Excel

Use this procedure to import participant-specific initial values from Microsoft Excel.

Prerequisites

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)

Context

You use the **Import Content from Excel** page to import and export Microsoft Excel spreadsheets.

Procedure

1. Create a sourcing event project into which you want to import item participants.
2. **Optional:** Invite participants to the event.
3. **Optional:** To create placeholder item and term entries in the template, add a line item with the terms for which you want to set participant-specific initial values.

Edit the term and set **Use participant-specific initial values** to **Yes** if it's not already set to this value.

4. Open the **Item Participants** worksheet of an Excel import template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content** and **Participants**. You can optionally select additional data categories to add or edit (**Rules** or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
5. On the **Terms** worksheet:
   a. Verify that the worksheet contains an entry for the term that you want to set participant-specific intial values for.
   b. Verify that the column entry **Use participant-specific initial values?** is set to **Yes** for the term.
6. On the **Item Participants** worksheet:
   a. Verify that the worksheet contains a column with the supplier user ID for each participant that you want to set participant-specific intial values for and that the row value is **Invited** for the appropriate items.

   You can also invite a participant for an item who is not already invited to the event by adding the user to the **Participants** worksheet [page 396].
7. On the **Participant Initial Values** worksheet, enter participant-specific initial values.

   The worksheet contains a column with the supplier user ID of each participant.

   To determine the row for a line item and term, use the **Number** or **Name** column to determine the item and the **Attribute** column to determine the term.
8. Save your changes.
9. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
10. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Importing Event Currency Conversion Rates from Microsoft Excel

Use this procedure to import event currency conversion rates from Microsoft Excel. Currency conversion rates are used in multiple-currency events to convert the participant bids to the currency for the event.

Prerequisites

- The event must be a multiple currency event (the event rule **Allow participants to select bidding currency** is set to **Yes**).
- You must be the event owner or have project owner capabilities for the event.

Context

In a multiple-currency event, participants can submit bids in currencies that are different than the currency for the event. Currency conversion rates (also referred to as exchange rates) are used to convert the participant bids to the currency for the event.

One or more currency conversion rate sets are defined for your site; in a multiple currency event, an event administrator selects one of these currency conversion rate sets for the event. To update conversion rates for an event with new rates, an event administrator can use the interactive user interface [page 279] or use the following procedure to import new rates from an Excel document.

> ⚠ Restriction
>
> You can modify conversion rates, but you cannot add currencies that are not defined in your SAP Ariba Sourcing solution.

Procedure

1. Open the **Currency Conversion** worksheet of an Excel import template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:

   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Currency Conversion Rates**. You can optionally select additional data categories to add or edit (**Contents Participants**, or **Rules**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.

2. Edit the values **Rate** column.

   Do not modify values in any column other than the **Rate** column.
3. Save your changes.
4. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
5. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Importing Event Conditions from Microsoft Excel

Use this procedure to import event conditions from Microsoft Excel. Event conditions enable you to make event questions, requirements, and attachments visible based on participant responses to event questions.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You define an event condition based to a participant responses to questions, then use the condition as a visibility condition for questions, requirements, and attachments. Content with a visibility condition is displayed only if the condition is fulfilled (is true).

For example:

- You define the event condition "Hawaii" that is true if a participant answers "Yes" to the question "Do you ship to Hawaii?"
- You select the event condition "Hawaii" as a visibility condition for an attachment.

- The attachment is visible only to participants who answer "Yes" to the question "Do you ship to Hawaii?"

Questions used to define an event condition must have an answer type with a limited set of values, such as Yes/No, numeric, date, money, a list of choices or a master data value.

To define conditions and set visibility conditions for content, an event administrator can use the interactive user interface [page 165] or use the following procedure to import conditions and set visibility conditions from an Excel document.

> → Tip
>
> You can create a condition with the interactive user interface before you create an Excel import template so the template contains an example of the condition syntax.
>
> See Event Condition Syntax for Excel Documents [page 405] for syntax information.

Procedure

1. Create an event and the questions [page 81] you want to use for conditions.
2. **Optional:** Create an example with with the interactive user interface [page 167].
3. Open the **Conditions** worksheet of an Excel import template.

   To create an Excel import template from a **published** sourcing event, see Exporting Sourcing Event Projects [page 407].

   To create an Excel import template from an **unpublished** sourcing event:
   a. Navigate to the **Content** or **Suppliers** tab of a sourcing project.
   b. Click **Excel Import** at the bottom of the page.
   c. In Step 1 of the **Import Content from Excel** page, select **Content**. You can optionally select additional data categories to add or edit (**Participants**, **Rules**, or **Currency Conversion Rates**).
   d. In Step 2 of the **Import Content from Excel** page, click **Click here to open your RFP in an Excel Spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create and download a template for the content you want to add.
4. Edit or add conditions in the **Conditions** worksheet. See Event Condition Syntax for Excel Documents [page 405] for syntax information.
5. **Optional:** To specify a condition as a visibility condition for a content item (question, requirement, or attachment), open the **Content** worksheet of the Excel template. Locate the **Visibility Condition** cell for the content item and enter the string from the **Name** cell for the condition.
6. Save your changes.
7. Return to the event to which you want to import. Navigate to the **Content** page, and click **Excel Import** at the bottom of the page to open the **Import Content from Excel** page.
8. On the **Import Content from Excel** page, select whether to add this data to the project or to replace the data. Select the Microsoft Excel spreadsheet file and any reference documents you want to import. Click **Import**

Next Steps

If an error occurs, you must correct the problem in your Microsoft Excel spreadsheet. If you click **Cancel**, you will be taken back to the **Import Content from Excel** page. Browse to your file again and re–attempt to import it.

Not all errors cause an error to be displayed. For example, if you accidentally changed an optional column heading, the system ignores it during import, and the expected data under the column does not appear. Always verify that the data you think you loaded is displayed online.

When the template is error free, SAP Ariba Sourcing returns you to the page from which you opened the **Import Content from Excel** page. Look through the imported information to see if it is what you intended. If necessary drag and drop, or copy and paste the information to order it correctly.

Event Condition Syntax for Excel Documents

> → Tip
>
> You can create a condition with the interactive user interface before you create an Excel import template so the template contains an example of the condition syntax.

Event conditions are defined using expressions based on responses to questions. The syntax used to define conditions in Excel documents is as follows:

- The question for the condition is preceded by its item number and enclosed in double quote marks (`" "`).
- If the response is text or **Yes/No**, the question is followed by an equals sign (=) and the required response in double quote marks. Responses to **Yes/No** questions are specified using `"true"` and `"false"`.
  For example, if the question "Do you ship to Hawaii?" is item number 1 in the event and you want to create a condition that is true if a participant answers "Yes" to this question, the expression would be:
  ("1 Do you ship to Hawaii?" = `"true"`)
- If the response is a number, date, or monetary value (type **Money**), the question is followed by the required response specified using `FROM` and `TO`. If only a single value is accepted, the same value is specified for both the `FROM` and `TO` values.
  For example, if the question "How many shipments?" is item number 1.1 and you want to create a condition that is true if a participant answers with a value from 1 to 9, the expression is:
  ("1.1 How many shipments?" `FROM "1" TO "9"`)
  To create a condition that is true only if the response is 1, the expression is:
  ("1.1 How many shipments?" `FROM "1" TO "1"`)
  Monetary values are specified by the quantity, followed by the currency ID. For example:
  ("1.2 Packing surcharge: `FROM "1 USD" TO "100 USD"`)
  Dates are converted from text descriptions in the user interface (such as **This Month**) to dates and translated to the language for the event. For example, **This Month** configured in March 2019 is converted as follows:
  - English: `("1.3 Which dates?" FROM "Fri, 1 Mar, 2019" TO "Sun, 31 Mar, 2019" )`
  - French: `("1.3 Quelle dates?" FROM "ven. 1 mars 2019" TO "dim. 31 mars 2019" )`
  - Japanese: `("1.3 どの日付?" FROM "2019 年 3 月 1 日(金)" TO "2019 年 3 月 31 日(日)" )`

An Excel spreadsheet for event conditions contains the columns **Name**, **Description**, and **Expression**. Conditions created from the **Add Question** page are created with a name based on the question in the expression. For example:

Name	Description	Expression
("Do you ship to Hawaii?" = `"true"`)		("1 Do you ship to Hawaii?" = `"true"`)

Users see the event name in the **Visibility Condition** field dropdown menu; you can edit the name to make it easier to understand.

You can use the operators in the following table to join expressions and create complex expressions. The examples use the following questions:

- Item 1: "Do you ship to Hawaii?"
- Item 2: "Do you ship to Alaska?"

Operator	Example
AND. Evaluates to true if all expressions are true (you cannot combine AND and OR). In the user interface, you configure this by selecting **All of**.	(("1 Do you ship to Hawaii?" = `"true"`) AND ("2 Do you ship to Alaska?" = `"true"`))
OR. Evaluates to true if any expression is true (you cannot combine AND and OR). In the user interface, you configure this by selecting **Any of**.	(("1 Do you ship to Hawaii?" = `"true"`) OR ("2 Do you ship to Alaska?" = `"true"`))
NOT and AND. Evaluates to true if any expression is false (behaves as if the operators are NOT and OR, or NOR). In the user interface, you configure this by selecting **None of**.	(NOT (("1 Do you ship to Hawaii?" = `"true"`) AND ("2 Do you ship to Alaska?" = `"true"`)))

Sourcing Event Data Export

Exporting Sourcing Event Projects

Use this procedure to export a sourcing event project for reference, or to import it later when you are creating a new project.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can export a published (active) event or a draft event and all its attachments, if any. You can import it later to create a new project or just keep it for reference.

> ⓘ Note
>
> - When you export event content to an Excel sheet, the date fields have the date and time format. This is to ensure that you see the correct date irrespective of your location. You can, however, choose to set the date field in the Excel to Short Date format.
> - There is no need export old projects as a way to archive them. SAP Ariba Sourcing keeps them indefinitely, has backup copies, and you can use the search feature to find them at any time.

You can use an exported Microsoft Excel spreadsheet to import data later. The exported spreadsheet contains a snapshot of content in your event. You can modify that data or add to it in Microsoft Excel, then import the modified spreadsheet back to SAP Ariba Sourcing to create a new project.

Procedure

1. Access the event monitoring interface for the SAP Ariba Sourcing event project that you want to export. It does not matter if the project is in the **Draft** or **Published** state.
2. Choose **Actions** > **Document** > **Excel Export**.
3. Select the data you want to export in Step 1. Pick everything that you might want to import later.
4. In Step 2, click **Click here to open your event in an Excel Spreadsheet**. This option enables you to either create the file and open it in Microsoft Excel or just save the Microsoft Excel file to a folder that you specify.
5. If you have attachments to this project and your intent is to create a new project later with this exported data, click **Click to download existing attachments into a ZIP file**. The event data spreadsheet does not go into this ZIP file. You specify the folder to which the ZIP file is downloaded.
6. Click **Done**, on the right, to return to the project.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]
Importing Event Data from Microsoft Excel [page 383]
Exporting Event User Interface Tables to Microsoft Excel [page 410]

Exporting Event Award Data

Your site may be configured to export contracts to one or more external systems' URL. Event results are available in the **Bid Report**, **Scenario Report**, **Questions and Terms Report**, the **Award Report** (draft contract). If enabled, these reports are sent as separate Microsoft Excel files in a ZIP file to a specified URL using an HTTP request.

Contact SAP Ariba Customer Support for more information about this configuration option.

If your site is configured for exporting of event award data, the **Contract** pull-down menu contains the option to choose **Export Draft Contract To** > **External System**.

Exporting Event Bid History to Excel

This feature allows you to export a bid history report to Excel. This report can be useful to buyers who would like to understand how their suppliers' bids have progressed throughout an event.

For example, if a buyer chooses to negotiate with suppliers after they've placed initial bids, the buyer might want to understand how the subsequent bids changed as a result of these negotiations.

For each line item, the report includes all bids that each supplier placed during the event, including the date and time of each bid. All terms appear in the report. The report shows the rankings of the most recent bids, and the percentage differences between the lower-ranked bids and the best bid.

The report includes these columns:

- **Supplier**: Name of the supplier
- **Item Name**: Name of the item
- **Item Order**: Numerical order of the item within the section
- **Bid Version:** The version number of each supplier's bid for the current event: whether this is the supplier's first bid in the event (bid version 1), second bid (bid version 2), and so forth. The bid version number is the same for all items in the event. Each time a supplier submits a new bid, the bid version number increases for all items in the event, even if the new bid does not include all items.

  > Note
  >
  > While alternative bids do not appear in the report, they cause an increase in the bid version number of the bids that do appear.

  > Note
  >
  > If you edit or update an item with a runtime edit to an event and choose to keep the bids before the update, the previous bids on that item do not appear in the report and the bid values are removed. However, for each supplier, the version number of the first bid after the update is that supplier's number of previous bids on the item plus 1.
  >
  > If you edit or update an item with a runtime edit to an event and discard the bids before the update, the discarded bids do not appear in the report and the bid version number is also discarded. In this case, both bid value and bid version number are cleanly removed.
- **Quantity**: Quantity of the item
- **Price**: Amount of the bid for the item
- **Currency**: Currency used in the event; for example US dollars (USD)
- **Extended Price**: Extended price of the bid for the item
- Terms: Competitive terms in the event, with a column for each
- **Rank**: The ranking of the latest bid from each supplier, for each line item
- **Change in Bid (%)**: For each supplier's latest bid on the item, the percentage difference between that bid and the best bid
- **Bid Status**: Whether the bid was accepted, rejected, or replaced
- **Latest Bid?**: Whether this was the supplier's last bid; possible values are **Yes** and **No**
- **Submit Date**: Date of the bid in the time zone of the user exporting the report
- **Submit Time**: Time of the bid in the time zone of the user exporting the report
- **Section Name**: Name of the section that contains the item being bid on

The report is available for events in the following states: **Open**, **Pending Selection**, **Awarded**, and **Closed**.

To export the report, navigate to the **Report** tab. Choose **Download Report** > **Bid History Report**.

Optional columns include the following:

- **Savings**: Savings compared with historical pricing data

Exporting Event User Interface Tables to Microsoft Excel

Use this procedure to export event user interface tables to Microsoft Excel.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

An alternative Microsoft Excel export format allows you to export the content of most pages to Microsoft Excel, although you cannot re–import data exported in this way. To export sourcing event data so that you can re-import similar data, see Exporting Sourcing Event Projects [page 407].

> **Note**
>
> If you want to export supplier bids (all bids or the active bids), you can use the Bids Report.

Procedure

1. In the upper right hand corner of any table, click the table options menu.
2. Choose one of the **Export to Excel** options. If Microsoft Internet Explorer tries to block the download of the file, choose to permit the download.
3. The file automatically opens in Microsoft Excel. These files cannot be re-imported.

Related Information

General Considerations for Importing and Exporting Sourcing Event Data [page 373]
Importing Event Data from Microsoft Excel [page 383]
Creating Event Bids Reports [page 450]

Configuring Column and Row Formats for Standard Offline Response Spreadsheets

Event participants can use **offline response spreadsheets** to create offline responses and bids.

Participants can can export (download) and import event data to a Microsoft Excel spreadsheet to use as an offline response spreadsheet. By default, SAP Ariba creates standard offline response spreadsheets as simple spreadsheets with one row for each lot, item, and question in an event. SAP Ariba also enables buyers to create **custom offline response spreadsheets** to use Excel functionality to collect and evaluate participant input before mapping it to standard event data fields.

Offline response spreadsheets are protected Excel spreadsheets, so users cannot modify the width or height of cells after the spreadsheet is downloaded.

The following options control cell width and height in standard offline response spreadsheets for all events.

Row height in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelRowHeight`)

Sets the default height of rows in a supplier bid spreadsheet. The default value is -1, which means that rows expand automatically to show all the contents for a single entry. For readability, you can limit the maximum row height by setting this to a positive number. A positive number specifies the maximum height (number of single lines in a cell) for the row height, based on the height of a single line of data. For example, if you set this to 3, the maximum row height is 3 times the height of a single line.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Maximum width for Name column in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthName`)

Sets the maximum width of the **Name** column (name of item or lot) in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthDescription` (set by SAP Ariba Support)

Sets the maximum width of the **Description** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthAnswer` (set by SAP Ariba Support)

Sets the maximum width of the **Anser** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

Related Information

Maximum width for Name column in supplier bid spreadsheets
Row height in supplier bid spreadsheets
About Using Custom Offline Response Sheets [page 413]
Parameter Management in Intelligent Configuration Manager
Custom Offline Response Sheets in Guided Sourcing Events

Using Custom Offline Response Sheets

About Using Custom Offline Response Sheets

Custom offline response sheets enable you to create your own customized version of the SAP Ariba Sourcing offline bid sheet. You have complete control over the customized offline response sheets you create. You can utilize all the functionality available in Microsoft Excel when creating your customized offline response sheets, you only have to map cell values from your custom offline response sheet into the standard SAP Ariba Sourcing offline bid sheet. You can control what content is customized at the content row level, for example, you can determine which questions can be customized in Excel and which questions can be answered in the SAP Ariba Sourcing user interface. Participants can only respond to the content you customize using the custom offline response sheet. Participants can respond to non-customized content using the user interface.

You also have the ability to create participant specific bid sheets, so if you have invited participants to certain items and not others, then each participant can have their own version of your custom offline response sheet.

Custom offline response sheet functionality allows you to create very complex events utilizing the power and functionality of Excel. You can collect pricing at the smallest level, aggregate that pricing up to the major levels you plan to award, and through the use of formulas you can have your offline content populate your online event. You can gather pricing for nearly a limitless number of items, as long as they rollup or aggregate to a level of items that fit in SAP Ariba Sourcing.

> ⓘ Note
>
> When you enable custom offline responses, participants cannot respond to non-customized content using the customized offline response spreadsheet. Participants must respond to non-customized content using the user interface.

Related Information

Configuring Event Customized Offline Response Content [page 416]
Creating and Importing Event Custom Offline Response Sheets [page 417]
Viewing Custom Offline Response Details Before Publishing Events [page 419]
Viewing Custom Offline Response Details After Publishing Events [page 420]

Validate custom offline responses

Custom Offline Response Sheet Validation

SAP Ariba Sourcing checks for out-of-sync spreadsheets when a user changes event values either by using the interactive user interface or by importing content from custom offline response spreadsheets. If SAP Ariba Sourcing finds any inconsistency, it displays an error message and requires the project owner or the participant to re-synchronize the content by using the following steps:

1. Delete the existing version.
2. Download a new custom offline response spreadsheet and customize it.
3. Import the new custom offline response spreadsheet to SAP Ariba Sourcing.

You can use the ICM parameter **Check for out-of-sync sourcing custom response Excel spreadsheets** (`Application.AQS.RFX.useNewValidationForCustomOfflineResponse`) to determine when you'd like SAP Ariba Sourcing to check for out-of-sync spreadsheets.

If this parameter is set to **No**, SAP Ariba Sourcing checks for out-of-sync spreadsheets only when a user changes event values by importing event content from custom offline response spreadsheets.

If this parameter is set to **Yes**, SAP Ariba Sourcing checks for out-of-sync spreadsheets when a user changes event values by using the interactive user interface or by importing content from custom offline response spreadsheets. SAP Ariba Sourcing displays an error message and requires re-synchronization when all of the following conditions are met:

- **Customized Offline Response** is set to **Yes**.
- **Visible to Participant** is set to **Yes**.
- Changes are made to supplier-facing terms.

If any of these conditions is false, SAP Ariba Sourcing doesn't trigger re-synchronization.

Best Practices for Using Custom Offline Response Sheets

Keep the following in mind as you create your offline response sheets:

- You must finish building your event before creating custom offline response sheets.
- Use color coding. Using colors and borders to indicate which cells require participants to enter data, can optionally be edited, or are read-only, will make it easier for participants to know where they need to enter values.
- Protect your sheet to ensure that participants do not accidently delete or enter data. This can help ensure participants enter data only where you want them to. Do not forget to unlock and unprotect cells that require participants to enter data. All cells are locked unless otherwise noted.
- Utilize Excel in cell validation to display warnings.
- Add comments to a cell. Entering detailed comments into each editable cell can help assist participants as they provide their response.
- It may be helpful to copy everything from the general spreadsheet. Then you do not have to recreate everything for participant specific custom offline response sheets.

- Hide all the worksheets except for your offline content.
- You can rename the offline content worksheet.
- Make all customized items/lots required. This ensures that participants do not have to select the customized item/lots when they access the event. If the customized items/lots are not required, participants cannot select the lots in the user interface and must use the Excel sheet.
- The maximum number of characters you can enter into a Microsoft Excel cell is 32,767. A maximum of 1,024 characters can display in the cell, all 32,767 can display in the formula bar.
- Do not include the character "/" in supplier names. For example, "a/b".
- Use Excel formulas to link the cells in the current sheet to their corresponding cells in the Ariba Sourcing general spreadsheet. Ensure that each data entry cell in the sheets created by Ariba Sourcing contains a simple reference formula, such as `='Offline Content'!$C$3`.

Participant Custom Offline Response Sheet Workflow Overview

When participants sign in to an event that requires custom offline responses:

- SAP Ariba Sourcing displays a **Download Content** button at the top of the page after all required access gates have been cleared. If at least one content item requires a custom offline response and has an access gate, then all prerequisites must be cleared before the **Download Content** button appears.
- **Custom Offline Response Sheet** icons display next to all content that requires a custom offline response.

When participants download custom offline response sheets, SAP Ariba Sourcing writes date and version information to the file. This information is later used to verify that the custom offline response sheet uploaded by the participant is current and for the correct event.

Participants must submit their intent to bid on custom offline content through the custom offline response Excel spreadsheet. Similarly, participants must also submit their response for this content through the custom offline response Excel spreadsheet. Participants cannot edit content requiring a custom offline response in the user interface.

After participants submit their custom offline response, SAP Ariba Sourcing maps the custom offline response to the event's online content. The participant's custom offline response sheet is available to you and the participant for download on the **Response Details** page.

Configuring Event Customized Offline Response Content

Use this procedure to configure event customized offline response content.

Prerequisites

Template owners must choose **Yes** for **Enable custom offline response** in the **Bidding Rules** section.

Custom offline response sheet functionality is available for all SAP Ariba Sourcing users.

> ⚠ Restriction
>
> By default, offline formula bidding is not enabled in templates.

Procedure

1. When you create items, terms, and questions you want to use as offline event content, choose **Yes** for **Customized Offline Response**, on the **Add/Edit** page.
2. Click **Done**.

Results

Custom Offline Response icons display next to content that requires a custom offline response. The same icon appears when participants sign in to view the event.

Related Information

About Using Custom Offline Response Sheets [page 413]
Creating and Importing Event Custom Offline Response Sheets [page 417]
Viewing Custom Offline Response Details Before Publishing Events [page 419]
Viewing Custom Offline Response Details After Publishing Events [page 420]

Creating and Importing Event Custom Offline Response Sheets

Use this procedure to create and import event custom offline response sheets.

Prerequisites

Template owners must choose **Yes** for **Enable custom offline response** in the **Bidding Rules** section.

Custom offline response sheet functionality is available for all SAP Ariba Sourcing.

> ⚠ Restriction
>
> - By default, offline formula bidding is not enabled in templates.
> - The .xlsx file format import is not supported for custom offline response sheets.

Context

You import your custom offline response sheets on the **Import Custom Response Excel Spreadsheet** page. You have several options when you upload custom offline response sheets, you can:

- Upload a default custom offline response sheet for all participants.
- Upload one common custom offline response sheet for a group of participants.
- Upload participant specific - custom offline response sheets for each participant.

If you modify the event content after you upload custom offline response sheets, SAP Ariba Sourcing displays an error message on the **Summary** page indicating that the custom offline response sheets are out of date. It is recommended that you upload custom offline response sheets after the event is fully designed.

Step 1 enables you to do one of the following:

- Download a default custom offline response sheet, which can be used by all participants.
- Download a participant specific - custom offline response sheet, defined for a specific participant in the event.

Both options enable you to create and then download custom offline response sheets. When you download a file, you can open it in Microsoft Excel or you can just save it to a folder that you specify. You can skip this step if you have already downloaded a default or participant specific custom offline response sheet.

If you have multiple suppliers, each with their locale, you must download the file that contains all the custom offline response sheets, modify them and then upload them for each supplier separately. This ensures that each supplier will get a custom offline response sheet in their own locale.

Procedure

1. Click **Customized Excel Import** on the Content page.

   The **Import Custom Response Excel Spreadsheet** page displays.
2. To download a participant specific - custom offline response sheet, choose **Click here to download Participant Specific - Customized Offline Bid Excel spreadsheets in a zip file.**

   The **Select Participants** dialog box displays.
3. Select the participants for whom you want to download a participant specific - custom offline response sheet and click **Download**. If a custom offline response sheet for a specific participant is outdated, you can also click **Download** to generate a new one.
4. Click **OK**.
5. Customize your offline response sheet.
6. Click **Import** at the bottom of the page to import the custom offline response sheet into your event.

   Excel files of only .xls format are supported for the import of custom offline response sheets.

Next Steps

After downloading the default or participant specific custom offline response sheet, you can create your own offline content in the **Offline Content** Worksheet. Define the relationship between your online and offline content using Excel formulas. You can utilize all the functionality that Excel offers to further customize and enhance your event.

After you have finished customizing your offline response sheets, you are ready to import them into SAP Ariba Sourcing.

Related Information

About Using Custom Offline Response Sheets [page 413]
Configuring Event Customized Offline Response Content [page 416]

Viewing Custom Offline Response Details Before Publishing Events

Use this procedure to view custom offline response details before publishing events.

Prerequisites

Template owners must choose **Yes** for **Enable custom offline response** in the **Bidding Rules** section.

Custom offline response sheet functionality is available for all SAP Ariba Sourcing users.

> ⚠ Restriction
>
> By default, offline formula bidding is not enabled in templates.

Context

Before you publish your event, you can view the custom offline response sheet details on the **Summary** page. The **Custom Response Spreadsheet Details** page displays information about the custom offline response sheets used in the event.

Procedure

1. Choose **Custom Response Spreadsheet Details** from the **Actions** menu in the **Overview** section.
2. Click **Show Details** to view additional information about the custom offline response sheets, including file name, date and time it was published, and the name of the user who uploaded the file.
3. Click a **Custom Offline Response Sheet** icon in the **Custom Response Excel Sheet** column or click the check box next to a participant and click **Download** to download a participant specific custom offline response sheet.

Related Information

About Using Custom Offline Response Sheets [page 413]
Configuring Event Customized Offline Response Content [page 416]

Viewing Custom Offline Response Details After Publishing Events

Use this procedure to view custom offline response details after publishing events.

Prerequisites

Template owners must choose **Yes** for **Enable custom offline response** in the **Bidding Rules** section.

Custom offline response sheet functionality is available for all SAP Ariba Sourcing.

> ⚠ Restriction
>
> By default, offline formula bidding is not enabled in templates.

Context

After you publish your event, you can view the custom offline response sheet details in the event's monitoring interface. The **Export Custom Response Excel Spreadsheet** page allows you to download default and participant specific custom offline response sheets.

Procedure

1. Choose **Customized Excel Export** from the **Actions** menu in the Overview section.
2. Click a **Custom Offline Response Sheet** icon in the **Custom Response Excel Sheet** column or click the check box next to a participant and click **Download** to download a participant specific custom offline response sheet.

Related Information

About Using Custom Offline Response Sheets [page 413]
Configuring Event Customized Offline Response Content [page 416]

Editing and Monitoring Events

About Editing Published Events

You can edit a published event, for example, you can invite another supplier, create or change a line item, or add another team member.

To edit a published event, choose **Actions** > **Edit** on the event monitoring interface.

When you edit a published event, the system creates a draft version of the event. All changes are done on the draft version and don't affect the published event until you replace the published event with the draft version by updating the event. Alternatively, you can discard the draft version.

When you republish an event, your sourcing solution displays "aribasystem" in the **Submitted By** field on the **Response History** page. When a participant updates their bid, SAP Ariba Sourcing displays the supplier's name in the **Submitted By** field.

About Viewing the Draft or Published Version

When you edit a published event, the system creates a draft version of the event. During the edit period the draft and the published versions coexist. You change the draft version without affecting the published event. When you are finished making changes, replace the published version of the event with the draft version by updating the event. When there is a draft of this event, you can change between the draft and published versions.

To switch the view to the published version of the event, click **Actions** > **View Published Version**. View the published version to perform Event Administration tasks such as deleting bids or extending and reducing the timing of lots or line items.

When you view the published version of an event that has a draft version, the system displays a message informing you that a draft version exists.

To view the draft version, choose ▶ **Actions** ▶ **View Draft Version** ▶. You can also immediately access the draft version by choosing ▶ **Actions** ▶ **Edit** ▶. This does not create a new draft version, it returns you to the existing draft version.

When you view the draft version of a published event, the system displays a message informing you that a published version exists.

Notifying Event Participants About Event Updates

When you edit and republish an event, you can choose to send the **Event Edited** and **Republished** notification to event participants. You can also include a personalized message to participants when you edit and republish an event. For example, you can summarize the changes you made to the event and highlight any changes that may require participants to take action.

> **Note**
>
> You must add the `CUSTOM_MESSAGE` notification template variable to the **Event Edited** and **Republished** notification template. If you do not add the `CUSTOM_MESSAGE` notification template variable to the **Event Edited** and **Republished** notification template, then your sourcing solution does not display a personalized message text box when you click the **Keep and email** or **Do not keep, and email** radio buttons.

Your personalized message appears in the **Event Edited** and **Republished** notification.

The content and participant changes you made appear at the bottom of the **Summary** page. This allows you to quickly review the changes you made and gives you the ability to write a more informative personalized message to the event participants.

Related Information

About Automatic Event Notifications [page 295]

Understanding Event Tabs

The various tabs of the event monitoring interface allow you to access information and take actions on specific areas of your event.

- Event Overview Tab [page 423]
- Event Bid Console Tab [page 425]
- Event Content Tab [page 430]
- Event Suppliers Tab [page 437]
- Event Team Tab [page 444]
- Event Report Tab [page 444]

Event Overview Tab

About the Overview Tab

The **Overview** tab allows you to view overview data such as:

- The event's creation date
- The template used to create the event
- The Target Savings %
- The version of the event
- The rules that determine how the event runs

Printing Event Information

We recommend you click **Print** instead of using your browser's print function, which does not reformat the page by removing the tabs and header information at the top. Clicking **Print** formats the page for printing, presents a preview, and shows the normal print dialog box for your operating system.

This action exports the event information to a file in Microsoft Word's DOC file format. You will also see this action from the **Summary** page. This function enables you to print the following event information:

- Overview
- Market feedback
- Team members
- Message board rules
- Timing rules
- Invited participants
- Auction format
- Customized messages

- Bidding rules
- Event content
- Currency rules
- Scoring
- Project owner actions

Once the event is in Microsoft Word, you can format it and print it.

To produce the output in HTML format, contact your SAP Ariba administrator.

Once the event is in Microsoft Word or HTML, you can format it as you like it and print it. There are no differences between the output formats other than how they are formatted and how you can edit and display them. The choice is personal preference.

Discarding Event Draft Versions

Use this procedure to discard event draft versions.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

If you edit a published event but decide not to update the published event with your changes, you must discard the draft version of the event. Otherwise the system does not allow you to award the event.

Procedure

1. Choose **Actions** > **View Published Version**.
2. In the warning message at the top of the page, click **Revert Draft**.
   If the Retain Approval for Publish task status after Revert Draft parameter is set to **Yes**, the **Approved** status for the **Approval for Publish** task is retained. If this parameter is set to **No** (the default value), the status for the **Approval for Publish** task is set to **Cancelled**.

Related Information

Understanding Event Tabs [page 422]

Using the Event Monitoring Actions Menu [page 475]

Viewing Event Change History

This procedure describes how to view event change history.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can view the differences between each version of the event and the version before it. For example, if you view the **Change History** for version 3, you see the changes made from version 2 to version 3.

Procedure

1. While viewing the event details, choose **Actions** > **View Change History**.
2. Select an event version.
3. Click **View Changes**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Event Bid Console Tab

About the Bid Console Tab

The **Bid Console** tab allows you to do the following:

- View response activity.
- View the **Bid History** table and the bid chart that shows the bidding history.
- View the event *Bid Graph*.
- Depending on your permissions, you might be able to open, close, extend or reduce the timing of individual lots. You also might be able to delete bids.

> ⓘ Note
>
> The **Bid Console** tab is not available for RFIs or RFPs because participants do not submit bids in those events.

Related Information

Deleting Event Bids [page 429]

Totals Row

The **Totals** row in the event information table does not appear by default. To see the **Totals** row, click the table options menu in the upper right and choose **Totals**. Totals list the total of all the leading bids, except it does not include pricing from envelope items.

> ⓘ Note
>
> The bid graph and the totals column only show information for participants who have bid on all biddable items. If a participant failed to bid on one biddable item, all their bids are excluded from this total.

Bid Graph

The bid graph shows the bids for the row selected in the table above it over a period of time. If you show the **Totals** row, as described in the previous topic, and select it, the graph shows the extended price totals for participants who bid on all biddable items. Select one line item in the table to show a graph of the bids for just that item.

- **View** – Choose "Selected Participants" to specify which participants' information you want to include in the graph. This does not affect the Bid History list, which shows all participants.
- **Term** – This enables you to view the price or the extended price. This option only appears when you select an individual line item in the table above.
- **Period** – Choose the time period that the bid graph covers. If you choose a time period during which there were no bids for the selected participants, the graph displays a message to that effect.

Closing Individual Event Lots and Line Items

Use this procedure to close individual event lots and line items.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Procedure

1. On the **Bid Console** tab of the event monitoring interface click the name of the lot or line item you want to close.
2. Choose **Stop Item**.

Results

The status of the lot moves to **Pending Selection**.

Next Steps

You can reopen the lot or line item to solicit more bids, or you can close it without awarding any business. When the event is **Pending Selection**, you can award the lot or line item if suppliers have submitted acceptable bids.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Reopening Event Lots and Line Items

This procedure describes how to reopen event lots and line items.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

If you have permission, you can reopen a lot or line item after it is closed. When you do this, your sourcing solution reopens the lot without affecting the timing of the other lots. For example, if you have an event with two lots, and both lots have closed. You can reopen lot 2 and allow participants to continue bidding on that lot.

Procedure

1. On the **Bid Console** tab of the event monitoring interface click the name of the lot or line item.
2. Choose **Reopen Item**.

Results

If you reopen lot one, it reopens immediately if you are using staggered bidding, with its default end time set to 10 minutes after the closing time of lot two. Lot two continues with no disruption. For serial bidding, lot one reopens after lot two closes. If there was a lot three, it opens after the reopened lot one closes.

Next Steps

You can reopen the lot or line item to solicit more bids, or you can close it without awarding any business. When the event is Pending Selection, you can award the lot or line item if suppliers have submitted acceptable bids.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Deleting Event Bids

Use this procedure to delete event bids.

Prerequisites

You must be a member of a project group in the event and the group must have the **Event Administrator**, **Limited Event Administrator**, or **Sourcing Project Administrator** role.

Context

If you have permission, you can delete bids. Suppose, for example, that one of the participants in an auction is confused, and submits a bid that is drastically higher or lower than the competitive prices. This can also happen if the participant inadvertently leaves out (or adds) zeros. Even though the bid is not reasonable, the system might define it as the leading bid, and base the bid improvement rules on that bid. In cases like this, you can delete erroneous bids in order to allow the auction to progress.

> ⓘ Note
>
> You can set floor or ceiling prices to make it impossible for participants to submit bids that are drastically high or low.

Procedure

1. On the **Bid Console** tab of the event monitoring interface, find the bid you want to delete in the **Bid History** table.
2. Click the bid and choose **Delete Bid**.

Results

The bid is removed from the **Bid History** table. In the **Bid Graph**, its color changes to black, indicating that it has been removed from the auction. The participant receives a notification stating that you deleted the bid. After a supplier bid is deleted, the previous bid from that supplier becomes active within the market.

Related Information

Understanding Event Tabs [page 422]

Using the Event Monitoring Actions Menu [page 475]

Event Content Tab

About the Content Tab

The **Content** tab allows you to compare supplier responses and send individual suppliers messages by item. Using the **Display** pull-down menu options and table options menus, you can filter, sort and organize supplier responses to your event in a several ways.

> ⓘ Note
>
> Members of the Project Owner group can edit any content, whereas team members can edit only the content that they have edit access to.
>
> When team members choose the edit option for the terms and conditions, they can see the original terms and conditions in the Initial Value field, and can upload a separate terms and conditions document for the suppliers they invite.
>
> A member of the Project Owner group can see the list of all the suppliers and the terms and conditions document uploaded by the team members who invited those suppliers under the List of Invited Participants tab.

For example, you can:

- View the responses for a single supplier only.
- View the responses to the prerequisite questions only.
- Choose which columns to display in the table (up to 13), such as **Supplier Name**, **Leading Supplier**, **Historic Price**, and **Reserve Price**. You can add or remove them to show only the information you want. By default, informational columns such as **Initial**, **Historic**, and **Leading** are always displayed.
  - Responses from suppliers are displayed in columns according to submission time. The most recent responses are displayed by default. The number of suppliers shown varies depending on how many informational columns are available.
  - If a supplier revises a bid, that supplier is included in the 13 default columns, and the oldest supplier response previously included by default is hidden. For example, suppose suppliers 2-13 are displayed by default on the **Content** tab. Supplier 1 then revises their response. Now, suppliers 1 and 3-13 are displayed by default because the response from supplier 2 was the oldest.

- View scoring results and event totals.
- You use the **Content** tab to compare supplier responses to an RFI or an RFP. You use the table options menu to choose the suppliers to compare.
- Close a line item.
- Send messages to individual participants after they have bid.

From the **Content** tab you can view formulas, if there is one associated with an item. When an **Fx** link appears, you can click it to see the formula used to calculate that value.

The **Content** tab is also a convenient place to export participant responses to Microsoft Excel.

The **Content** tab does not show up for RFP events that used the "Optimization for Request for Proposal" template. That template is designed for large events where the content is entirely imported from Microsoft Excel spreadsheets.

When the event has envelopes, the envelope icon shows which envelopes have been opened.

To the right is generally a column for every participant and their response for each content element. You can only see the responses for open envelopes.

If you open an envelope and do not select a participant, the participant's column is removed from the **Content** tab.

Real-Time Optimizations

Your site can be enabled for real-time optimizations through the `Application.AQS.RFX.AllowToOptimizeDuringBidding` site configuration parameter, as described in Site Configuration Options for Managing Events [page 561]. If real-time optimizations are enabled, the event **Scenario** tab is absent and scenario information is shown under the **Content** tab instead.

Related Information

Viewing Real-Time Optimization Information [page 432]
Managing Responses to Event Prerequisite Questions [page 435]
Adding Comments to Participant Responses [page 434]
Exporting Event User Interface Tables to Microsoft Excel [page 410]
Viewing Product Questionnaire Responses [page 556]

Read Only for Participants

The **Read Only for Participants** field allows you to lock suppliers down on pricing for certain items while you continue to negotiate the price of other items within a sourcing event.

If your site has the SAP Ariba Strategic Sourcing Suite, this field appears on the edit items page within a sourcing event. It allows buyers to make an item that has already been quoted for by suppliers read-only so that suppliers cannot change the quoted price. This field is only editable when all invited suppliers have sublitted an initial bid on the relevant line item.

When updating a sourcing event, if there are line items in the event that were made Read Only for Participants there is no option to discard supplier responses and a warning to that effect is displayed before you select **Update Event**.

When importing sourcing event line items from an Excel file, if there are line items in the file that were made Read Only for Participants and if there is no initial supplier response for those items, an error is displayed when you try to publish the sourcing event.

If, as a buyer, you create a follow-on event, copying line items from a previous event, the supplier prices from the earlier events are copied into the Participant Initial Value field. Where there is a Participant Initial Value the line item can be marked as Participant Read Only.

For suppliers, if a line item is made read-only for participants after they submit an initial bid, when they update a sourcing event that contains that line item all fields are no longer editable for the item.

You can make multiple line items in a sourcing event read-only for participants simultaneously. When all suppliers have responded to an event you can select multiple line items and then select **Edit** > **Content** to display a page where you can select **Yes** to make all of the selected items Read Only for Participant.

Viewing Real-Time Optimization Information

If real-time optimizations are enabled for your site, you can use this procedure to view optimization information from the **Content** tab. You can view and evaluate (optimize) scenarios while the event is open for bidding; you do not have to wait for the event state to change to **Pending Selection**.

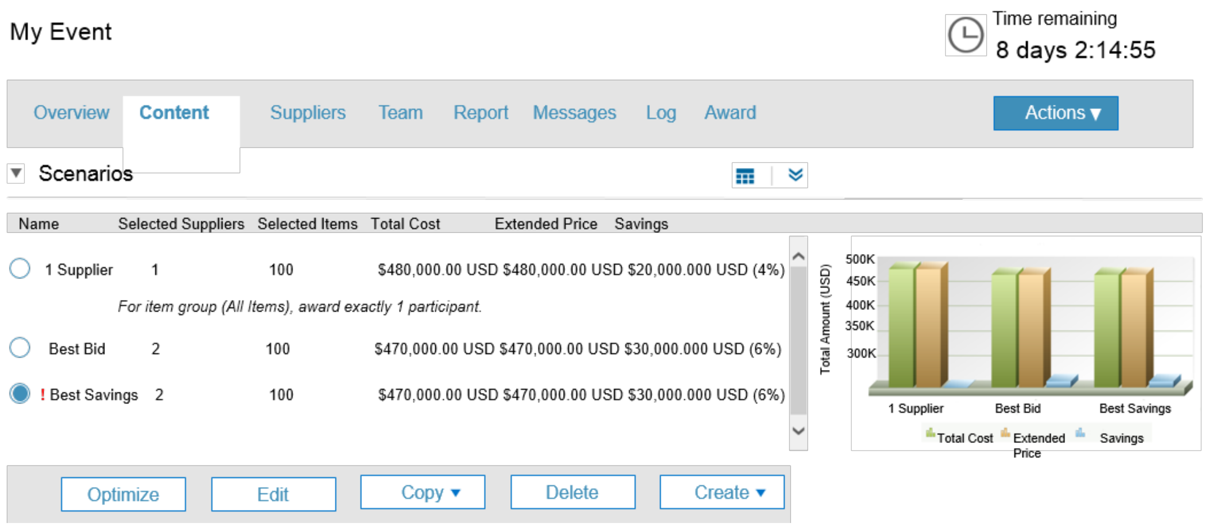
Prerequisites

- Your site must be enabled for real-time optimizations through the `Application.AQS.RFX.AllowToOptimizeDuringBidding` site configuration parameter, as described in Site Configuration Options for Managing Events [page 561].
- You must be the event owner or have project owner capabilities for the event.

Procedure

1. On the event monitoring interface, click the **Content** tab.
2. In the top left corner of the page, click the expansion arrow for the **Scenarios** area.

   The following is an example of a **Contents** tab with scenario information..



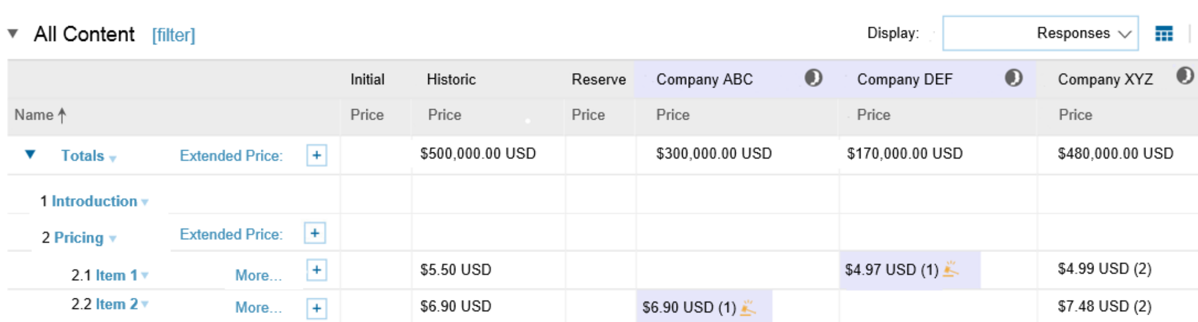
The information includes a scenario table and bar graph with scenario optimization results. The scenario table and bar graph show the preconfigured optimization scenarios applicable to your event. The bar graph shows results for up to 5 optimization scenarios. If savings are calculated for event items, the 5 scenarios with the most savings are shown; if savings are not calculated, the 5 scenarios with the lowest extended price are shown.

3. **Optional:** You can select a scenario in the table and click **Optimize** to evaluate (optimize) the scenario while the event is open.

   If you optimize a scenario and new or revised responses are received, a red exclamation mark ( ) appears next to the scenario name to indicate that the results are out of date. You can select the scenario and click **Optimize** to reevaluate the scenario.
4. **Optional:** To view details about a scenario, select the scenario in the table and navigate to the **All Content** area below the **Scenarios** area. Select **Display: Responses** in the **All Content** area.

   The bids with the items and suppliers selected for the scenario are highlighted.

   In the following example, the **Best Bid** scenario selects items from the suppliers Company ABC (Item 2) and Company DEF (Item 1):



5. **Optional:** You can create or edit a scenario by clicking the **Create** or **Edit** button in the scenario table.

Related Information

About Awarding Events [page 316]

Awarding Events Using Manual Scenarios [page 318]
Awarding Events Using Event Optimization Scenarios [page 333]
Awarding Events Using Preconfigured Optimization Scenarios [page 337]
Multithreading for bid rank evaluation [page 576]

Adding Comments to Participant Responses

Use this procedure to add comments to participant responses.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

Team members can add responses directly to participants' responses. They can send comments or additional information for each response, or they can enter all their comments first for all responses, and then send them all at once. When composing their message, team members can decide to send the comment to all participants, or only to the participants that they select.

Procedure

1. On the event monitoring interface, click the **Content** tab.
2. Choose **Responses** from the **Display** pull-down menu.

   To add a comment on a response for a line item, select one of the following display options: **Price, Quantity, Extended Price** or **Savings**.
3. Move the cursor over the response row in the column of the participant that you want to add a comment for. A **Comment** icon appears. Click the **Comment** icon.
4. The comment text box pops up. Enter your comment, and either save it, or click **Send all Comments** to send all comments after you have collected and saved other replies to the participant's responses. Click **Apply to all participants** if you want to send the comment to all participants for that response.

Results

Participants receive an email notification with the buyer's comments. In addition, they can review and respond to any comments online. Comments from the buyer on specific responses are indicated by an icon on their *Console* page. Any replies they sent are viewable by the project team.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Managing Responses to Event Prerequisite Questions

Use this procedure to manage responses to event prerequisite questions.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You must review and accept prerequisite questions that require owner review before participants can continue with the event. If you deny a response, participants can modify their answers and resubmit their response again until you accept it. You can add specific comments to participants about their responses, which they can review and reply to.

After you have accepted an answer, you cannot change the status, and participants cannot modify their response. When you reject an answer, you can change the status to **Pending** or **Accepted** regardless if whether participants submitted an updated response.

You can perform the following actions when reviewing participant responses:

- Accept the response and clear the gate for the participant to continue with the event. If this prerequisite is a participation gate question, the participant can now enter responses to event content. If this prerequisite is an access gate question, and the attribute **Visible to Participants** is set to **Yes, after access gate is cleared** for certain event content, that event content is now visible to participants.
- Reject an answer to a prerequisite question. Participants can revise their answers, which owners can then accept.
- Change the status of a response from rejected to pending to indicate to the participant that you are reviewing the response.
- Send a comment to a participant, for example, to ask for more clarification before accepting the prerequisite response.

Procedure

1. On the **Content** tab, choose either **Responses** or **Prerequisite Responses** from the Display pull-down menu.

2. Responses that require your review are indicated by a yellow triangle. Move your mouse into the cell until you see a **Comment** icon appear.
3. Click the **Comment** icon. The **Action** menu is displayed.
4. Click **Accept**, **Reject**, **Pending**, or **View/Add Comments**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Using the Pivot User Interface for Event Content Tables

This procedure demonstrates how to use the pivot user interface for event content tables.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The pivot user interface provides you with advanced filtering of the content data in the **Content** tab while you are creating or on the event monitoring interface. This is useful when your content data is extensive, and you want to view certain aspects of it to answer various business questions, or to check that you have the appropriate content for an event.

The pivot user interface allows you to filter content data and control the data display for your event content in the various event monitoring interface tabs. The content is arranged in a continuous list. You must scroll down through this list to see all of the data. The pivot user interface allows you to compare groups of data side by side.

Procedure

1. Click the table icon and select a value under **Select / Filter**.
2. Click the table icon and select **Show Detail Rows**, to view additional details.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Event Suppliers Tab

About the Suppliers Tab

The **Suppliers** tab allows you to view supplier information and take actions related to event participants:

> ⓘ Note
>
> Team members can see only those suppliers that they invited to the event (in the **Invited Participants** list) and the messages those participants sent.
>
> Members of the Project Owner group can see all the suppliers invited by team members and also the names of the team members who invited those suppliers (in the **Invited by** column).

- See whether or not the supplier is currently connected to your sourcing solution.
- See status information about how far suppliers have progressed through the bidding process.
- Lock a supplier out of the event.
- Submit a surrogate bid for a supplier, if you are a member of the Surrogate Bidders group.
- See if participants from the same supplier organization are grouped as a supplier response team.
- See the date and time of participants' last sign in to your sourcing solution.

When you open an envelope, you can only see suppliers who have not been deselected.

Supplier Connection Status

When a participant is connected to the application, a small icon of a head and shoulders appears on the left hand side of that participant's row. If you see a red X over the icon, the participant has recently signed out. When a participant disconnects, the icon disappears.

Participant Status

The **Status** column tells you where each participant is in the bidding process.

Status	Meaning
	No status indicates that the supplier has not yet accepted or declined the supplier agreement.
Accepted Agreement	The supplier accepted the supplier agreement but has not yet indicated intent to bid on specific items.
Declined Agreement	The supplier actively declined the supplier agreement and does not intend to participate in the event.
Decline to Respond	The participant has clicked the Decline to Respond button and cannot respond to the event.
Intends to Participate	The supplier accepted the supplier agreement and has expressed interest in bidding on one or more lots.
Participated	The supplier has submitted a response.
Reconciled Lot Details	The supplier has provided lot-level details after the auction status moved to Pending Selection. This status applies only to auctions in which the supplier bids at the lot level and competes at the lot level.
Submitted Prerequisites	The supplier has responded to prerequisite questions but has not yet indicated their intent to respond to one or more lots.
Submitted Prebid	The supplier has submitted a prebid.
Submitted Prebid with Alternative	Prior to an event opening, the supplier has submitted both a prebid and an alternative bid.
Participated with Alternative	The supplier has submitted an alternative bid.

Declining to Respond

When a participant clicks **Decline to Respond**, the project owner is sent an email notification indicating the participant does not intend to participate in the event and the participants' status on the Suppliers tab displays "Decline to Respond".

A yellow icon to the right of the status indicates that the supplier added a comment. Click the **Comment** icon to read it.

Decline to Respond is available to participants until the bidder agreement is accepted, or the participant selects **Intend to Respond**. The participant can also decline to respond by clicking the link provided in the event-notification email. **Decline to Respond** statuses are reset when published events are updated. This allows participants to review the changes to the event before deciding to respond.

Participants can enter a comment when declining either directly by clicking on the link provided in the email invitation message, or when clicking **Decline to Response** on the Event Details page. In both cases, a **Reason for Declining to Respond** comment box is displayed, where the participant can enter a comment, which is then sent to the event owner as an email message.

Locking Versus Removing Participants

Locking participants out of an event is a reversible action. When you unlock participants, their access is restored as if they had never been locked. Locked participants' bids remain in effect:

- The system counts them in bidding rule calculations.
- If they are leading bids, they remain leading.
- You can award business to a locked participant.

You can also remove a participant's access to an event by performing a runtime edit of the event and removing them from the Supplier or Buyer page, or by editing individual line items and uninviting them. Choose to remove a participant using this method when you are confident you will not need to restore their access to the event. When you remove a participant's access in this way:

- Your sourcing solution revokes their access to the event. If they are currently viewing the event, they see an error message.
- Your sourcing solution invalidates their bids. The bids disappear from the bid history, and they become black in the bid graph, signifying that the bids existed, and influenced the progress of the market, but are no longer associated with a participant and are invalid. If the participant had placed the leading bid, the next best bid becomes the leading bid, and indicates that change by placing a new black bidding mark at that point on the bid graph.
- The participant's lot participation choices (the selections they made on the Choose Lot page) are removed.
- The record of their having accepted the Event Agreement is removed. If you reinvite them to the event later, they have to reaccept it.
- Notifications and messages are not deleted from their Notification and Message Center. If you reinvite them to the event, any notifications they received are still accessible.

Related Information

About Editing Published Events [page 421]

Supplier Response Teams

Participants from the same supplier organization can be grouped as a supplier response team. Response team participants appear in a hierarchical view below their organization name, and **Yes** appears in the **Response Team** column. If a response team exists for an organization and additional participants from the same organization are added before bidding starts, the participants are automatically added to the existing response team.

After bidding starts, participants from an organization with a response team that bid individually are not grouped under the organization, they appear as individual participants.

If **Private Messaging** is enabled, you can choose to send messages to specific response team contacts or send messages to the whole response team.

Surrogate bidding and locking participants out of an event can only be performed at the response team organization level.

Related Information

About the Messages Tab [page 465]

Locking Event Participants

Use this procedure to lock event participants.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

Suppose you determine that one of the participants you invited to your event is not serious about competing. Perhaps the participant is attending your event in order to learn about competitors' prices, or for some other reason. You can lock the participants out of the event, completely removing the participant's ability to access any information associated with the event.

Procedure

1. On the **Suppliers** tab, select the participant you want to lock.
2. Click **Lock/Unlock**.

Results

The value in the **Locked** column changes to **Yes** to indicate that the participant has been locked out of the event. The participant is immediately returned to the **Event List** page and can no longer see your event. A notification message informs the participant of the lockout.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Placing Surrogate Bids

Use this procedure to place surrogate bids.

Prerequisites

To place surrogate bids, you must be a member of one of the following:

- **Event Administrator** group (access to this group must be approved by SAP Ariba)
- **Sourcing Project Administrator** group
- **Surrogate Bidders** group (access to this group must be approved by SAP Ariba)
- **Surrogate Bidders** group on the **Team** tab of the event

> ⚠ Restriction
>
> Surrogate bidders cannot access or change participant account preferences.

Context

Surrogate bidding enables a team member to act as a participant for the purpose of placing bids if the participant cannot, perhaps because of technical problems.

Procedure

1. On the **Suppliers** tab, select the supplier on whose behalf you want to place a bid.
2. Click **Surrogate Bid**. You see the supplier's interface. Note the line at the top of the page that lets you know that you are acting as a participant: Acting as: <participant’s name>(Stop).
3. Click your event in the event list. Navigate to the console and place the participant’s bid.
4. Click **(Stop)** after Acting as: <participant’s name>, at the top of the page to stop surrogate bidding and return to your own view of the event.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Events That Do Not Allow Surrogate Bidding [page 50]
Surrogate Bidding When the Event Is Closed or Supplier Bids Are Visible [page 442]

Surrogate Bidding When the Event Is Closed or Supplier Bids Are Visible

Use this procedure to place a surrogate bid when the event is closed or supplier bids are visible.

Prerequisites

To place surrogate bids, you must be a member of one of the following:

- **Event Administrator** group (access to this group must be approved by the SAP Ariba Market Coordination Team)
- **Sourcing Project Administrator** group
- **Surrogate Bidders** group (access to this group must be approved by the SAP Ariba Market Coordination Team)
- **Surrogate Bidders** group on the **Team** tab of the event

A published event template with the bidding rule **Allow surrogate bids when event is closed** set to **Yes**. The optional rule **Require surrogate bid justification** can be set to **Yes** or **No**.

Context

Surrogate bids can be placed when the event is in **Pending Selection** for regular events and when the supplier bids are visible for envelope and sealed bid events. A comment or message and an optional attachment can be required when users surrogate bid.

Procedure

1. Create a regular, envelope, or sealed bid event.
2. Publish the event.
3. Suppliers bid on the event.

   For regular events, it is not necessary for suppliers to bid. Surrogate bid is available on the **Suppliers** tab when the event is in **Pending Selection**.

   Supplier bidding is required for envelope and sealed bid events.
4. Stop the event.

   The event is in **Pending Selection**.

   Supplier bids are on the **Content** tab of the event.

   For regular and sealed bid events, surrogate bid is available on the **Suppliers** tab of the event.
5. Open all envelopes for envelope events.
   Surrogate bid is available on the **Suppliers** tab of the event.

6. Go to the **Suppliers** tab to place the surrogate bid.
7. Select the supplier and click **Surrogate bid**.
8. Add the bid details and click **Submit Entire Response**.

> ⓘ Note
>
> If a surrogate bid message is required, a popup appears. In the popup, choose the recipients of the surrogate bid justification message. Add a message or comment, and an optional attachment.

Results

An icon appears next to the supplier name on the **Content** tab of the event indicating a surrogate bid has been placed.

The **Log** tab has an audit entry **System process:Bid on behalf** for the surrogate bid.

If a surrogate bid message is required, the **Message** tab has a surrogate bid message that is sent to the chosen recipients.

Related Information

Placing Surrogate Bids [page 441]
Creating Events That Do Not Allow Surrogate Bidding [page 50]

Resending Event Invitations to Suppliers

Use this procedure to resend event invitations to suppliers.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

When you publish an event, the system automatically sends invitation email to invited participants. The system does not send instant messages, since generally your participants are not signed in to the system at that time. The system generates different emails depending on whether or not a participant has used the system before. The system also logs this action to the Log tab.

Your sourcing solution enables you to resend event invitation to suppliers from the event monitoring interface.

Procedure

1. On the **Suppliers** tab, select the participant that you want to resend an event invitation.
2. Click **Resend Invitation Email**.

Results

Your sourcing solution adds the resent notifications to the **Log** tab, to serve as a record of your event.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Event Team Tab

The **Team** tab allows you to view information about team members and groups.

Only members of the Project Owner group can edit teams.

Related Information

About Event Team Members and Project Groups [page 45]

Event Report Tab

About the Report Tab

The **Report** tab allows you to view summary information about the event, including financial, invitation, bidding, and lot details. Report data is real time, so as the event progresses you see the data change. You use the pivot user interface to adjust the content table.

You can use the **Report** tab to output selected suppliers' bid responses to a PDF document. This allows you to quickly print and store bid responses offline. You can also convert the content on the **Report** tab into a PDF document. You can use the pivot user interface to choose the content you want to display and convert it to a PDF document.

Evaluating an Event Using the Event Reports

The combination of event data and Microsoft Excel pivot table functionality allows you to perform a thorough analysis using the event reports. You can use the reports to monitor the progress of an event, perform price analysis, or create reports on a completed event to present to your managers.

Your sourcing solution supplies the following event reports:

- **Full Bid Data Reports** (Creating Event Full Bid Data Reports [page 446])
- **Item Rank Reports** (Creating Item Rank Reports [page 448])
- **Bids Report** (Creating Event Bids Reports [page 450])
- **Bids Summary Report** (Creating Event Bids Summary Reports [page 452])
- **Bid Change Reports** (Creating Bid Change Reports [page 454])
- **Questions and Terms Report** (Creating Event Questions and Terms Reports [page 456])
- **Scenarios Report** (Creating Event Scenarios Reports [page 457])
- **Supplier Response Report PDF** (Creating Event Supplier Response Report PDFs [page 458])
- **Event Summary Report PDF** (Creating Event Summary Report PDFs [page 460])

> ⓘ Note
>
> If you use Microsoft Internet Explorer to open SAP Ariba Sourcing and your site has the CUP-21666 (ActiveX removal for Sourcing Reports) feature enabled to remove dependency on ActiveX for exporting reports to Microsoft Excel, you might find that some columns are missing from the exported reports, for example the **Initial**, **Historic**, **Reserve**, and **Leading** columns. In this case, you need to go to the **Data** tab of a Microsoft Excel sheet and click **Refresh All** to manually refresh the objects.

Exporting Bids Reports to an External System

This option exports the **Bids Report** as a CSV file by HTTP request. To set this up you need the URL of a web server that accepts a file containing this data. Call SAP Ariba Customer Support with this URL to have them enable this feature. You can specify URLs for multiple external systems and provide any names you wish as labels for the export menu items.

On the **Report** tab, click **Download Reports** and select the name of the external system to which you are exporting the reports.

This menu option initiates the HTTP request to the specified URL. If you specified a direct-action URL, it opens that URL in your browser window.

> Note
>
> Non-direct-action URLs are not supported.

You are free to design the receiving URL to handle the file in any way necessary. The name of the file is `eventname.csv`, where `eventname` is the name of your event.

Creating Event Full Bid Data Reports

Use this procedure to create an event full bid data report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

A full bid data report is an event report in Excel format that shows the most recent bids for all suppliers and all other bids for the event, including the **Leading** bids and system bids, such as **Initial** and **Historic** bids.

> Restriction
>
> If you generate an event report for a large-capacity event that is still open, the **Rank** values will be `-1` for all bids and the values for the **Leading** bids will be absent or empty. To get **Rank** and **Leading** bid information for a large-capacity event, generate an event report after the event closes.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Select the term to use for the report, such as **Extended Price**.
3. Click **Download Reports**.
4. Select **Full Bid Data Report**.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
5. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

A full bid data report contains the following Excel worksheets:

- **Overview Sheet**: contains overview information, such as the event ID, event name, and time and dates for the event and report.
- **Full Bid Data Sheet**: contains all current bid values.

The **Full Bid Data Sheet** contains the following columns:

- **Participant**: can be the bidder name, source of the values (such as **Historic** or **Initial** for values entered when the event was created), or **Leading** to indicate a leading bid.
- **Bid ID**: internal bid ID.
- **Bid Status**: status of the bid. **Default** indicates values entered when the event was created.
- **Submission Date**: date and time the bid was submitted.
- **Number**: item number.
- **Name**: item name.
- **Type**: entry type, such as **Line Item**.
- **Rank**: rank of the bid, where 1 is the best bid.
- **Price**: price of the bid.
- **Quantity**: quantity of the bid.
- **Extended Price**: calculated extended price of the bid.
- **Savings**: calculated savings of the bid.
- **Comments**: responses entered by participants for item terms for each line item. This can include additional information that the participant wants to communicate to you.

Related Information

[Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Item Rank Reports [page 448]
Creating Event Bids Reports [page 450]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]

Creating Item Rank Reports

Use this procedure to create an item rank report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

An **Item Rank Report** contains worksheets that show the rank of bids for each participant you select for the report. The report also contains **Lead Participant** and **Incumbent** columns that show the leading (best bid) participant and leading incumbent participant for each item.

> ⚠ Restriction
>
> If you generate an event report for a large-capacity event that is still open, the **Rank** values will be `-1` for all bids. To get **Rank** information for a large-capacity event, generate an event report after the event closes.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Select the term to use for the report, such as **Extended Price**.
3. Click **Download Reports**.

4. Select **Item Rank Report**.
5. Select the participants for the report and click **Export**.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
6. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

An **Item Rank Report** contains the following Excel worksheets:

- **Overview Sheet**: Contains overview information, such as the event ID, event name, and time and dates for the event and report.
- **Competitive Term Sheet**: Contains a row for each item with columns for the participant with the leading bid, incumbent participant with the leading bid, and a column for each participant selected in step 5 with the rank of the participant's bid.
  A **Competitive Term Sheet** contains the following columns:
  - **System ID**: Internal ID for the item.
  - **Number**: Item number.
  - **Name**: Item name.
  - **Type**: Type of entry, such as **Line Item**.
  - **Lead Participant**: Name of the participant with the leading (best) bid.
  - **Incumbent**: Name of the incumbent participant with the leading (best) bid.
  - **Initial**: Initial price for the item.
  - **Reserve**: Reserve price for the item.
  - **Historic**: Historic price for the item.
  - **Leading**: Leading price for the item.
  - *`participant_name`*: Value of the bid submitted by *`participant_name`*.
  - *`participant_name`* **Rank**: Rank of the bid submitted by *`participant_name`* for the term selected in step 2, where 1 is the best bid.
  - **Quantity**: Quantity for the item.
- **All Terms Sheet**: Contains a row for each bid for each item submitted by the participants selected in step 5, with columns for each term.
  An **All Terms Sheet** contains the following columns:
  - **System ID**: Internal ID for the item.
  - **Number**: Item number.

- **Name**: Item name.
- **Type**: Type of entry, such as **Line Item**.
- **Lead Participant**: Name of the participant with the leading (best) bid.
- **Incumbent**: Name of the incumbent participant with the leading (best) bid.
- **Initial**: Initial price for the item.
- **Reserve** : Reserve price for the item.
- **Historic**: Historic price for the item.
- **Leading**: Leading price for the item.
- **Rank**: Rank of this bid, where 1 is the best bid.
- **Supplier**: Name of the participant for this bid.
- **Quantity**: Quantity for the item.
- **Price**: Price submitted by the participant for this item.
- **Extended Price**: Calculated extended price for the item.
- *`term`*: Additional term for the item, such as **Savings**. If there is more than one additional term, there is a column for each additional term.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Event Bids Reports [page 450]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]
Including Alternative Bids in Bid Ranking [page 228]

Creating Event Bids Reports

Use this procedure to create an event bids report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The **Bids Report** lists all of the supplier responses (and the scores for those responses), and allows you to filter the data by supplier. The filtering can help you work with large amounts of data resulting from numerous bids. You can use this report to export all supplier bids to Microsoft Excel.

The **Bids Report** includes these sheets:

- **Price**
- **Extended Price**
- **Savings**
- **Rank**
- **Unit Cost**
- **Total Cost Data** (raw data used to generate the report, which you can use to generate custom reports).

> ⚠ Restriction
>
> If you generate an event report for a large-capacity event that is still open, the **Rank** values will be `-1` for all bids and the values for the **Leading** bids will be absent or empty. To get **Rank** and **Leading** bid information for a large-capacity event, generate an event report after the event closes.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Click **Download Reports**.
3. Select **Bids Report**.
4. Select **Active Bids** or **All Bids**. This filters the report by the type of bid. Active bids are accepted bids; all bids means all submitted bids, whether accepted or not.
5. Specify the suppliers to include in the report.
6. Click **OK**. The data exports to Microsoft Excel.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
7. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]

Creating Event Bids Summary Reports

Use this procedure to create an event bids summary report. A bid summary report provides summary information of all bids, including initial, historic, reserve, leading, lead participant, incumbents, and supplier bids. You can use Excel functions to analyze bids.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

> ⚠ Restriction
>
> If you generate an event report for a large-capacity event that is still open, the values for the **Leading** bids will be absent or empty. To get **Leading** bid information for a large-capacity event, generate an event report after the event closes.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Click **Download Reports**.
3. Select **Bids Summary Report**.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
4. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Reports [page 450]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]

Creating Bid Change Reports

Use this procedure to create a bid change report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

A **Bid Change Report** shows changed bids for a selected participant. The report shows the participant's last previous bid value and current bid value for each item.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Select the term to use for the report, such as **Extended Price**.
3. Click **Download Reports**.
4. Select **Bid Change Report**.
5. Select the participant for the report and click **Export**.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
6. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

A **Bid Change Report** contains the following Excel worksheets:

- **Overview Sheet**: Contains overview information, such as the supplier name, event ID, event name, and times and dates for the event and bids.

- **Bid Change Sheet**: Contains last previous bid values and current bid values.

The **Bid Change Sheet** shows values using the following format:

- Item names are highlighted in green.
- Changed term values are highlighted in yellow. You can also filter the output to show only the entries with the value **Yes** in the **Item Changed** and **Term Changed** columns.
- Column **A** (unlabeled) contains the item or term name.
- The **Previous Bid** column shows the value for a term in the last previous bid. If a value has not changed, this value is the same as the current bid value.
- The **Current Bid** column shows the value for a term in the most recent bid.
- The **Item Changed** column is **Yes** if any term value changed for the item.
- The **Term Changed** column is **Yes** if the term value changed for the item.

For example:

	A	B	C	D	E
1		Previous Bid	Current Bid	Item Changed	Term Changed
2	Item A				
3	Price	5	4.95	Yes	Yes
4	Quantity	1000	1000	Yes	No
5	Extended Price	5000	4950	Yes	Yes
6	Item B				
7	Price	5	5	No	No
8	Quantity	1000	1000	No	No
9	Extended Price	5000	5000	No	No
10					

For Item A, the bidder changed the **Price** from `5` to `4.95`. The value for the calculated term **Extended Price** is based on the **Price** term, so the value for **Extended Price** also changed.

The bidder did not submit new bid values for Item B, so **Item Changed** and **Term Changed** is **No** for all rows related to Item B.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]

Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]

Creating Event Questions and Terms Reports

Use this procedure to create an event questions and terms report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The **Questions and Terms Report** contains all of the non-quantitative data from the event. This report can be useful for RFI or RFP events. You can view all of the data or use various filters.

The data exports to Microsoft Excel. The **Question and Terms Report** includes these sheets:

- **Questions and Terms**
- **Instructions**

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Click **Download Reports**.
3. Select **Questions and Terms Report**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]

Creating Event Summary Report PDFs [page 460]

Creating Event Scenarios Reports

Use this procedure to create an event scenarios report.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

A scenarios report allows you to compare award scenarios side-by-side and determine savings on various lots and line items in the event.

The report is an Excel file that includes the following sheets:

- **Pivot**
- **Scenarios - Items**
- **Scenarios - Suppliers**

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Click **Download Reports**.
3. Select **Scenarios Report**.

   If this is a large-capacity event, a request to generate the report is submitted to a separate process (the report is not generated by the same process that manages the user interface). You can navigate away from the **Reports** tab and close your session while your report is being generated. SAP Ariba sends an email notification when the report is generated; if you are signed in to SAP Ariba Sourcing, SAP Ariba also sends an instant notification.
4. If this is a large-capacity event and you have received a notification indicating that report generation is complete, navigate to the **Report** table at the bottom of the **Report** page. Click the **Download** link for the report you want.

Results

SAP Ariba creates an Excel file with the report. If no worksheet in the report contains more than 65,535 rows, SAP Ariba creates a file in the Excel 97-2003 file format (`.xls`); if the report contains a worksheet with more than 65,535 rows, SAP Ariba creates a file in the Office Open XML SpreadsheetML file format (file with a `.xlsx` extension).

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Supplier Response Report PDFs [page 458]
Creating Event Summary Report PDFs [page 460]

Creating Event Supplier Response Report PDFs

Use this procedure to create an event supplier response report PDF.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> If the Estimated total pages and file size exceeds the *Supplier Response* size limit, the **Export** button on the **Export Supplier Response Report to PDF** page is disabled and a warning message displays.

Context

You can choose specific supplier responses to export to a supplier response report in PDF format. The PDF document includes information about the event, a table of contents, and supplier responses to the event. It can also contain product questionnaire responses, which enables public sector buyers to include the European Single Procurement Document (ESPD) questionnaire responses in the supplier response report.

You use the **Export Supplier Response Report to PDF** page to choose the participants you want to include in the **Supplier Response** report. The **Export Supplier Response Report to PDF** page displays event participants who have submitted bids. By default, the **Export Supplier Response Report to PDF** page displays participants with the following statuses:

- **Participated**
- **Reconciled Lot Details**
- **Submitted Prerequisites**
- **Submitted Prebid**
- **Submitted Prebid with Alternative**
- **Participated with Alternative**

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Click **Download Reports**.
3. Select **Supplier Response Report PDF**.

   SAP Ariba displays the **Export Supplier Response Report to PDF** page.
4. Choose the participants you want to include in the **Supplier Response** report.
5. Click **Export**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Summary Report PDFs [page 460]
Enlarge page size of supplier response report PDF files

Creating Event Summary Report PDFs

Use this proecedure to create an event summary report PDF.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The **Event Summary Report PDF** converts the content displayed on the **Report** tab into a PDF document. You can use the **View** pull-down menus to control the event information displayed on the **Report** tab. The **Event Summary Report PDF** includes information about the event and the content displayed on the **Report** tab.

Procedure

1. On the event monitoring interface, click the **Report** tab.
2. Use the pivot user interface to choose the content you want to display.
3. Click **Download Reports**.
4. Select **Event Summary Report PDF**.

   SAP Ariba converts the current view of the **Report** tab to a PDF.
5. Open or save the file to your computer.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating Event Full Bid Data Reports [page 446]
Creating Item Rank Reports [page 448]
Creating Event Bids Summary Reports [page 452]
Creating Bid Change Reports [page 454]
Creating Event Questions and Terms Reports [page 456]
Creating Event Scenarios Reports [page 457]
Creating Event Supplier Response Report PDFs [page 458]

Creating Configurable Bid Comparison Reports

Buyers can use this procedure to configure the bid comparison report to show the values of terms and rolled-up terms, formulas, item rank, percentage difference from the lead bid, and supplier responses to your questions.

Prerequisites

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)

To create or edit templates, you must be a member of the **Template Creator** group or the template project's **Template Creator** team.

Context

Buyers can run a bid comparison report when at least one participant response is available for a sourcing event. Buyers can configure the report to include only the information that is useful to them when they are deciding which suppliers should receive an award. Buyers can save report configurations for use in the future. After reviewing the report, buyers may even decide that it isn't prudent to award business at this point. They may decide to engage in more rounds of negotiation.

The report lets you easily compare the values of line items or lots across suppliers. It lets you easily compare, across suppliers, the values of numeric terms that you have chosen to see rolled up (summed) in the section summary.

The report can include supplier responses to questions you've asked.

Template creators can include settings for the bid comparison report in their templates, so that buyers can use the report settings in events created from those templates. When template creators create a report configuration and click **Save**, they can create a sample report.

Pricing conditions are supported in bid comparison reports. For terms that include pricing conditions, a block is included in the spreadsheet that gives details for the pricing conditions. Note that highlighting is not supported for pricing condition terms, and pricing conditions are supported only when you choose to display terms in rows.

If Category Attribute Hierarchy is enabled for your site, product questionnaires, including supplier answers to questions, can be added at item level in the configurable bid comparison report. For more information, see Adding Product Questionnaires to Configurable Bid Comparison Reports [page 554].

Restrictions

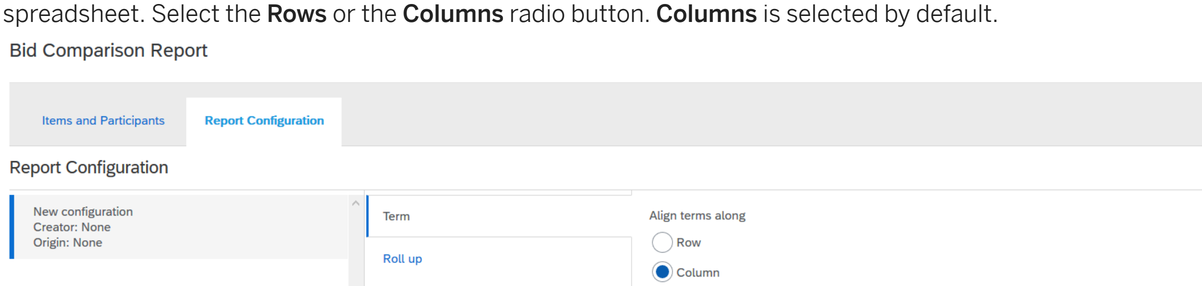
- The report is only for RFPs, supports line items but not questions, and doesn't support volume tier pricing.
- Roll up functionality is not available when you choose to display terms in rows.
- When you choose to display terms in rows, Quantity and Unit of Measure are displayed in columns if the terms do not have participant specific values. If terms do have participant specific values, Quantity and Unit of Measure are displayed as in rows.
- Pricing conditions are supported only when you choose to display terms in rows.
- Highlighting is not supported for pricing condition terms.
- Only terms with the following data types support custom highlights:
  - Money
  - Decimal
  - Single Line
  - Whole Number
  - Date
  - Yes/No
  - Percentage
  - Quantity
- Cost groups and product questionnaire terms are not supported.
- Bid comparison reports are not available for large-capacity RFP events.

Procedure

1. On the **Report** tab in the event, click the **Download Reports** button, and choose **Bid Comparison Report**.

   You see two tabs: **Items and Participants** and **Report Configuration**.
2. On the **Items and Participants** tab, choose items, lots, and participants for the report. For participants, you can choose all, incumbents, participants who submitted a response, participants whose bids are worse than the lead bid by a percentage you specify, or you can choose specific participants.

   Note that the information on the **Items and Participants** tab isn't saved in the report configuration. You choose this information each time you run the report. Only the information on the **Report Configuration** tab is saved.
3. On the **Report Configuration** tab, under **Terms**, choose the terms to export in the report. You can drag-and-drop a term to change its order in the report.
   You can choose the axis on which you want to have terms aligned on the report spreadsheet. Select the **Rows** or the **Columns** radio button. **Columns** is selected by default.



Note that roll up functionality is not available when you choose to display terms in rows.

4. Under **Roll up**, choose the terms (for example, **Savings** and **Extended Price**) to roll up in section and event totals.
5. Under **Highlight**, you can do the following:
   - When you choose **Lead bid price**, competitive terms are highlighted in the lead bid within the report. You can choose a color for each. You can restrict lead bid total to bids of participants with 100% participation (that is, participants who bid on every item/lot in the event).
   - You can select **Different initial and submitted values** to highlight terms or questions where an initial value is added by the buyer and where the supplier gives a different value when submitting their reponse. You can choose a color to use for highlighting.
   - When you click on the **Highlight customization** link, a page is displayed where you can select terms or questions for which you want to add highlight customization based on conditions that you can set. For example, you could set a condition to highlight the Price term value where the value for that term in the supplier response is less than or equal to a specific amount.

   Note that only terms with the following data types support highlight customization:
   - Money
   - Decimal
   - Single Line
   - Single Line Limited
   - Whole Number
   - Date
   - Yes/No
   - Percentage
   - Quantity

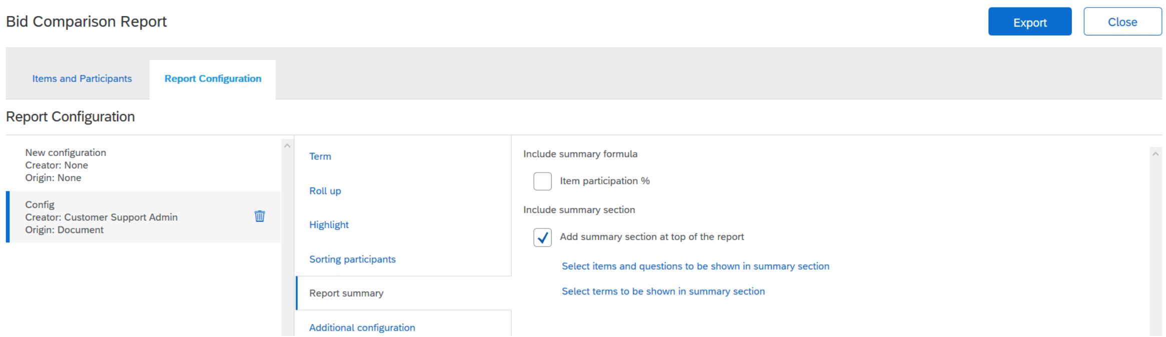
   The following operations are supported for all supported data types except string and Boolean:
   - Greater than
   - Less than
   - Equal to
   - Not equal to
   - Greater than or equal to
   - Less than or equal to

   Equal to and Not equal to operations are supported for the string data type, and Yes/No values are supported for the Boolean data type.

   There is an order of precedence for highlighting based on the features in the Highlight section. The highlighting selected for the first feature, **Lead bid price**, takes first position in this order of precedence, with settings selected under **Highlight customization** taking the lowest level of precedence. For example, say Price is the competitive term for a lead bid and you select the **Lead bid price** checkbox and the color red for highlighting this term. Under **Highlight customization** you also select the Price term, but there you select blue as the highlight color. In the report spreadsheet, Price will be highlighted in red, as the **Lead bid price** setting takes precedence.
6. Under **Sorting participants**, you can choose to sort them by name, event-level total (best total bid on all items a participant bid on), or item participation (best percentage of items bid on). You can drag-and-drop the criteria to choose their sort order in the report; for example, to have the participants sorted first by name, then by item participation, then by event-level total.

7. Under **Report summary**, you can do the following:

    - You can include the percentage difference from the lead bid total, either for participants with 100% participation or without it. You can also include the item participation percentage.
    - Under **Include summary section**, you can select the **Add summary section at top of the report** check box if you want to add a summary section at the top of the report spreadsheet. Click on the **Select items and questions to be shown in summary section** and **Select terms to be shown in summary section** links to select the items, questions, and terms that are displayed in the summary.



    Note that the **Include summary section** functionality is only available when **Rows** is selected under **Terms**.

8. Under **Additional configuration**, you can do the following:

    - Include item rank (the rank of bids for each participant you chose for the report), percentage difference from lead bid, and supplier responses to your questions.
    - When you select **Include questions** you have the option to add the questions to the same sheet in the report or to a new sheet, called **Questions**. This option is only available when terms are displayed in rows. **No** is selected by default, which means that questions are added to a separate sheet in the report by default.
    - When the **Create header information sheet** check box is selected, a new sheet is added to the report, called Header Sheet, which contains the following information about the event: Project Name, Event Name, Publish Date/Time, and Close Date/Time.
    - When the **Include supplier participation summary** check box is selected, a **Supplier Participation Report** is added to the report spreadsheet above the terms and questions. This lists the suppliers that were invited and their participation status.

    If the event uses multiple currencies, you can include the participant bidding currency. If alternative bids are allowed in the event, you can include any alternative bids provided by suppliers. If alternative bids on lots are allowed in the event, you can include these bids if suppliers provide them.

9. Click the **Export** button. The **Save Configuration** popup appears, allowing you to save the report configuration with a name. Open the report when it becomes available.

    Alternatively, if you want to compare more than 100 supplier bids, the **Bid comparison report** popup opens when you export the report. This popup displays the report, which is split into multiple files of 100 bids each. You can then download these files separately one after the other.

    Report configurations that you save appear on the **Report Configuration** tab under the **Report Configuration** heading. To edit these report configurations, click the one you want and change the configuration using the previous steps. Click **Export** again to save the changed configuration. If you don't change the name in the **Save Configuration** popup, the existing report configuration is updated. If you change the name, the changes are saved under the new configuration name.

    You might have to save or close one report before opening a new one.

Event Messages Tab

About the Messages Tab

The project owner and participants communicate using messages, which are useful for technical problems or questions. Received messages display in the browser window and are archived in the **My Messages** or **Messages** tab. Messages are also sent to each recipient's regular email address.

> ⓘ Note
>
> - Select an individual message and click the **View**, **Respond**, or **Delete** button at the bottom.
> - View the message text by clicking the message subject, on the right.
> - If you click the name in the **From** or **Contact Name** column, a properties dialog box appears.
> - To sort the list by any column, click the column heading.
> - Messages that you have not read are shown in Bold.

Messages can go to all participants or none. If **Private Messaging** is enabled, you can also choose to select specific participants. For that choice, a dialog appears from which you can check the participants you want to select. **Private Messaging** only adds the ability to select participants. You always have the option to select individual team members. Contact SAP Ariba Customer Support if you want **Private Messaging** enabled. Messaging with participants is only available during an event when the message board is open.

When a participant sends a message, it goes to all team members but not other participants. When a participant replies, it goes to the sender and any other team members who also received the message.

When a team member sends a message, it only goes to the selected recipients. When a team member replies, the reply goes to the person who sent it, plus any other recipients the replying team member selects.

Default Message Board Recipients

You can configure the default behavior of the **To** field when team members compose messages on the event message board. By default, the **To** field can display all, none, or selected team members and participants. You can also choose to disable the ability for team members to select **All** when sending messages.

The following **Event Message Board** rules control the default behavior of the **To** field:

- **Choose the default recipients for emails sent to team members** - This rule determines the default behavior of the **To** field when composing messages to team members. By default, emails composed on the event

message board are sent to all team members. You can also disable the ability for users to send messages all team members.
- **Choose the default recipients for emails sent to participants** - This rule determines the default behavior of the **To** field when composing messages to participants. By default, emails composed on the event message board are sent to all participants. You can also disable the ability for users to send messages all participants.

Related Information

Event Rules Reference Guide

Viewing the List of Message Recipients

When a message is sent to multiple users, you can click on the link in the **To** column to view the full list of message recipients.

When your sourcing solution exports messages to Microsoft Excel, the full list of message recipients is displayed in the Excel spreadsheet.

The **View Message** page displays the list of users who have viewed the message.

The **Viewed By** field only displays users who have signed in and viewed the message on the event message board.

Your sourcing solution creates entries in the event audit log when any of the following actions occur:

- When a user composes a message
- When a user replies to a message
- When a user views a message for the first time

Sending New Event Messages

Use this procedure to send new event messages.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

Your sourcing solution allows the project owner and participants to communicate using messages, which are useful for technical problems or questions. Received messages display in the browser window and are archived in the **My Messages** or **Messages** tab. Messages are also sent to each recipient's regular email address.

Procedure

1. Click **Compose message** at the bottom of the **Messages** tab.
2. Select the recipients. You can send a message to all participants or select specific participants if Private Messaging is enabled.

   Similarly, you can choose to send a message to all team members, specific team members, or none.
3. Give the message a title. By default the subject is prefixed with the event ID, but you can change or remove it, if necessary.
4. Type in the text of the message.
5. Click **Send**.

Results

When you send a message, the recipient sees:

- A dialog box in the lower right hand corner of their browser window.
- A message on their **My Messages** or **Messages** tab list.
- A regular email, if they correctly entered their email address in their user profile.

When a user is signed out, your sourcing solution continues to forward received messages to the user's email address, and also archives the user's messages in the **Messages** tab or **My Messages** page.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating New Event Message Labels [page 468]
Adding and Removing Existing Event Message Labels [page 469]
Using Event Message Table Options [page 470]

Creating New Event Message Labels

Use this procedure to create new event message labels.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can use labels to identify related messages and to filter the messages displayed. Event message boards have the following predefined message labels:

- **High Priority**
- **Participant Question**
- **Public Q&A**

> ⓘ Note
>
> These labels are reserved and cannot be edited or deleted.

You can associate labels and filter messages directly on the Messages tab in the event monitoring interface. You can also associate messages with labels on the **View Message** and **Respond to Message** pages.

Procedure

1. Click **Manage Labels** on the **Messages** tab.

   A Label Editor pane opens.
2. Click **Add a New Label**.

   The **Label Edito**r displays additional fields:
3. Enter the name and description of the new label.
4. Click **Done**.
5. Click **Save Changes**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Adding and Removing Existing Event Message Labels [page 469]

Adding and Removing Existing Event Message Labels

Use this procedure to add and remove existing event message labels.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can use labels to identify related messages and to filter the messages displayed. Event message boards have the following predefined message labels:

- **High Priority**
- **Participant Question**
- **Public Q&A**

> ⓘ Note
>
> These labels are reserved and cannot be edited or deleted.

You can associate labels and filter messages directly on the **Messages** tab in the event monitoring interface. You can also associate messages with labels on the **View Message** and **Respond to Message** pages.

Procedure

1. Click the selection box to the left of the message name.
2. Click **Associate Labels** at the bottom of the message board.
3. Click the appropriate label from the pull-down menu.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Creating New Event Message Labels [page 468]

Using Event Message Table Options

This procedure describes how to use event message table options.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You can use the table options icon to export event message content to Microsoft Excel.

Procedure

1. Click the table options icon.
2. Choose the messages you want to export.
3. Export all the rows in the messages list by choosing **Export all Rows**. If you have enough rows that the list has multiple pages, you can click **Export Current Page** to include only the data on the current page.
4. You can show the text and envelope information of all messages by choosing **Show Details**.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Event Log Tab

About the Log Tab

The **Log** tab displays a list of significant event actions performed by participants, the project owner, system administrators, and the system. You use the log to verify that users participate, to see when participants enter and exit the event, to see when they downloaded attachments, or to help you resolve disputes.

> ⓘ Note
>
> A member of the Project Owner group can see all the logs. Team members can see only the logs corresponding to the suppliers they invited.

Entries include the following information:

- The time the incident occurred.
- The name of the user who performed the action
- The user's name if the action was performed on behalf of another user
- The name of the action
- A description of the action

SAP Ariba Sourcing adds entries to the audit log when the following incidents occur in a sourcing event:

- A participant enters or exits an event
- A user composes a message
- A user replies to a message
- A user views a message for the first time
- A participant saves their bid.
- The system auto-saves a supplier's bid. Participants must submit any event prerequisites before their bid auto-saves and the action is added on the **Log** tab.
- A participant is invited to a published event
- A participant is removed from a published event

Sometimes users take actions that only apply to a single lot within the event. When this is true, the Scope column indicates the lot to which the action applies.

The **Log** tab also displays messages when supplier responses are rejected, such as:

- Improvement rule violation
- Buffer rule violation
- Tie bid rule violation
- Required attribute value violation
- Invalid attributes value violation
- Ceiling value rule violation
- Duplicate bid submission
- Change in event status while the event is in progress

Disabling Automatic Event Notifications

Use this procedure to disable automatic event notifications.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> **Restriction**
>
> Disabling automatic event notifications does not impact participant or team member generated messages.

Context

Automatic event notifications can be enabled or disabled directly from the Actions menu. Notifications generate automatically to inform users about the state of an event. Depending on the situation, notifications are sent as instant messages, emails, or both. An entry is added to the audit log on the **Log** tab each time automatic event notifications are enabled or disabled.

Procedure

1. Click **Actions**.
2. Click **Disable Automatic Event Notifications**.

Results

Your sourcing solution displays a message above the event monitoring interface indicating that automatic notifications are turned off for the event.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
About Automatic Event Notifications [page 295]

Event Scenario Tab

Using award scenarios, you can create alternative winner scenarios and save them in the event. In each named scenario, you can vary the award lots and suppliers, compare scenarios, and export them to Microsoft Excel for analysis. You can award business based on one or several scenarios. The **Scenarios Report** displays the various award scenarios for your review.

> ⓘ Note
>
> The **Scenario** tab is not present if your site is enabled to use real-time optimizations. When real-time optimizations are enabled, you view scenario information using the **Content** tab.

> ⓘ Note
>
> The **Scenario** tab is available for competitive bid events that have line items.

> ⓘ Note
>
> Team members cannot create scenarios or awards.
>
> When a team member chooses a manual scenario created by a member of the Project Owner group and clicks **View**, the **Awards** tab displays only the details that are relevant for the suppliers that the team member invited.

There are manual and optimization scenarios.

- Use manual scenarios to award business to suppliers for relatively simple or small events. Manual scenarios are available in the sourcing solutions from SAP Ariba.
- Use optimization scenarios to award business to suppliers for large or complex events with specific awarding requirements. Optimization scenarios are available in SAP Ariba Sourcing.

General award information:

- After bidding closes for all lots, the event enters the *Pending Selection* state and you can award business or invite suppliers to the next round in the sourcing process.
- You are not required to award all items at once; you can return later to complete awarding. You can also change your mind and submit a new scenario with a new allocation on the lots and line items.
- When you submit your awarding decisions, you decide if your sourcing solution automatically generates emails informing both awarded and non-awarded participants of your decision. You can customize these emails by clicking **Customize Award Emails**.
- By default, the event automatically moves to the **Completed** state when there is at least one award for each item in the event. Automatic event completion can be disabled by setting the site configuration option `Application.AQS.AutoEventCompletionWhenAllItemsAwarded` to `No`. If automatic event completion is disabled or you want to close the event without awarding some items, you manually close the event by choosing **Actions** > **Close Event**.
  For more information about the site option `Application.AQS.AutoEventCompletionWhenAllItemsAwarded`, see Site Configuration Options for Managing Events [page 561].
  After the award, the event moves to the Completed state. If you do not want to award some lots, and want to complete the event, choose **Actions** > **Close Event**.

ⓘ Note

The **Scenario** tab does not appear if the awardable term is set with a Team Access Control that you do not have permission to view.

Related Information

Creating Event Scenarios Reports [page 457]
Awarding Events [page 316]
Awarding Events Using Event Optimization Scenarios [page 333]
Automatic Event Notification Templates [page 296]

Lot Reconciliation

If you have lots in your event of type "Bid at Lot Level" or "Compete at Lot Level," your suppliers must log back into the system after the event moves to the **Pending Selection** state in order to submit their line item pricing. The prices they enter for the line items need to add up to the total price they bid for the lot. This process is known as lot reconciliation. Educate your suppliers about this step in the sourcing process.

You cannot award lots until the supplier completes lot reconciliation. Suppliers who are not getting an award do not need to reconcile their lots before you can award to others. However, it is good practice for all suppliers to reconcile their lots, since reconciliation can play a part in the award decision.

Event Award Tab

The **Award** tab displays the awards for an event that you made in the **Scenario** tab. The **Award** tab lists the line item or lot, the winner, the price, and other information regarding the awarded suppliers. It also shows the award status for awards that are pending approval or have been approved and awarded.

ⓘ Note

- The **Award** tab is available for competitive bid events (auctions), RFPs, and RFIs.
- The **Award** tab does not appear if you are not allowed to view the awardable term, as set by a Team Access Control.
- Team members can view only the details related to the supplier they invited to the event.

You use the pivot user interface to adjust the content table.

After you award an event, you can use that event information to export a draft contract to your local desktop by clicking **Contract**. If you are in a group with permission to create contracts and have a contract solution, you can also create new contracts or add this event data to an existing contract.

If you have permission to export award data to external systems, you can create additional menu items such as the "External System" option.

Related Information

Using the Pivot User Interface for Event Content Tables [page 436]

Using the Event Monitoring Actions Menu

Available event-wide actions depend on your permissions and the event state. During bidding, you can edit the event, export content to a Microsoft Excel spreadsheet, or pause, stop, or cancel the event. When the event is in **Pending Selection** state, you can grade supplier bids.

> ⓘ Note
>
> You must be a member of the **Sourcing Agent** group to perform many of the actions described in this section. If you are viewing the event monitoring interface at a low resolution, for example 800 x 600, and the **Discovery Suppliers** tab is displayed, Ariba recommends you use Firefox to access Ariba Sourcing. Internet Explorer may not display the Action menu in the event monitoring interface when using a low resolution.

Extending or Reducing Event Timing

If you have permission, you can extend or reduce the time remaining in the event's current phase. For an RFI, RFP, or when an Auction is in a preview state, you extend or reduce the timing in the **Actions** menu by choosing the **Reduce Timing** or **Extend Timing** options.

During an Auction, where timing is based on lots, you can click a lot and choose **Extend Timing** or **Reduce Timing**.

The bidding end time may not be automatically adjusted if you extend time in the preview period. If you choose **Parallel** for the timing rule **Specify how lot bidding will begin and end** and **Fixed time** for **Response end time**, and if you extend the time in the preview period, then the bidding end time isn't automatically extended. To force the bidding end time to be automatically extended, under **Timing Rules** > **Response end time**, choose **Duration** instead of **Fixed time**.

Adjusting the Bidding Start Time

If you have defined a preview period, and its end time is before the bidding start time, the period in between becomes the "prebid review period."

While you are in this preview period, if you extend or reduce its duration, that changes the length of the prebid review period. When you extend or reduce a preview period, you see an additional option to Adjust bidding start time, so that you can restore the review period to its intended size (even if it is zero).

If you enable this option, the system delays or advances the bidding start time to match the extension or reduction of the preview period, so that the length of the prebid review period remains the same.

Stopping Events

If you have permission, you can stop an event by choosing **Action** > **Stop Event**. All lots close and the event moves to **Pending Selection** status, and participants are notified. Stop an event when you know there are no more responses coming in. You might also stop an event if the buyer does not want a particular item to run or be bid on, but doesn't want to cancel an entire project. This option is visible until the bidding periods are all closed.

Canceling Events

If you have permission, you can cancel an event by choosing **Actions** > **Cancel Event**. You can undo a cancellation and return an event to **Pending Selection** state, then edit the event, reopen the lots or line items for bidding, and so on.

You might cancel an event if:

- You want to run it another day and you do not want to pause it.
- There is an error in the project and the event needs to be rebuilt with new information.

To undo cancellation from the details or event monitoring interface of a cancelled event, choose **Actions** > **Undo Cancel**.

Closing Events

If you have permission, you can change to the **Completed** state by choosing **Actions** > **Close Event**.

Opening Envelopes

If the event has envelopes you can open them by choosing **Actions** > **Open Envelope**. Every time you open an envelope you must select which participant responses you want to include.

If you do not check the box next to a participant:

- You cannot see their response on the **Review Envelope Content** tab.
- Any responses from previous envelopes are deleted, unless the **Keep the Rejected Envelope Bids** and **Discard Bids for Event Updating** rules are configured.
- The participant is removed from the list for any unopened envelopes. This is how you disqualify and remove participants who you no longer wish to consider for an award.

When you click **Open Envelope**, you can specify who is notified.

Opening Rejected Envelopes

Use this procedure to open rejected envelopes.

Prerequisites

The ability to open rejected envelopes is only available when:

- The **Allow rejected envelope bids to be opened** is set to **Yes**.
- The event is in a **Pending Selection** state.
- The user is a member of the **Recover Rejected Envelopes** group.

Procedure

1. On the **Content** tab in the event monitoring interface, choose **Actions** > **Open Rejected Envelopes**.
   SAP Ariba displays the **Open Rejected Envelopes** page.
2. Select the participants for which you want to open rejected envelopes.
3. Click **Open Rejected Envelopes**.
   SAP Ariba displays the **Open Rejected Envelopes Confirmation** page.
4. Click **Send Emails to Selected Participants** if you want to alert participants that their envelope has been opened.
5. Click **Open Rejected Envelopes**.
   SAP Ariba displays the **Content** tab in the event monitoring interface.

> Note
>
> After the rejected envelopes have been put back into an event, they cannot be rejected again.

Exporting Event Content to Microsoft Excel

When you choose **Actions** > **Excel Export** you see the **Export Content to Excel** page. Follow the steps to export a version of your event into a Microsoft Excel file that can later be imported.

You can also click the table options icon and choose one of the **Export to Excel** options. This type of export is available in tables on the **Content** and the **Bid Console** tabs. Although this option exports a wider variety of data, it cannot be reimported into the system.

Related Information

Creating Sourcing Event Data Using Excel [page 373]
Read and write Excel files in XLSX format for supplier bidding

Publish Approval Tasks

If you are a member of a group that does not have permission to publish an event, such as the **Junior Sourcing Agent** group, you see a **Submit** button instead of a **Publish** button. A designated approver, such as a user in the **Sourcing Approvers** group, must approve it. After approval, the event automatically publishes.

The link **View Publish Approval Task** allows you to track the progress of the approval.

This link is disabled for Sealed RFP events (events where the Marker Feedback rule "Can owner see responses before event closes" is set to **No**.) When the event goes to **Pending Selection** state, this link is reenabled.

Related Information

Approving Event Publish Approval Tasks [page 288]

Downloading All Supplier Attachments

You use this option to download all the attachments from all the suppliers at one time. If there are attachments to download, you can specify where to save them. Attachments are in a ZIP file organized into folders by event, supplier organization, and participant name. The format is:

```
<eventName>_<eventID>/<orgName>_<participantName>/<fileName>
```

If there are no attachments, a message to that effect appears when you select the action. If the total file size of the attachments you are downloading exceeds 100 MB, a warning message appears. You can continue to download the attachments, however it is recommended that you perform multiple downloads by selecting specific participants or questions.

All team members have permission to use this action. However if the access control settings prevent a team member from seeing certain content, then any attachments to that content are not downloaded for that team member.

For events containing envelopes, the download action does not download any Supplier attachments for items within a sealed envelope. Only when the envelope is opened and the contents visible in the user interface does the action download its attachment.

All attachment downloads are logged in the audit log.

If the guided sourcing functionality is enabled in your site, you can download all supplier attachments for guided sourcing events from the guided sourcing user interface. For more information, see Guided Sourcing Event Monitoring in Managing Events with Guided Sourcing.

Accessing the Event Monitoring Interface

use this procedure to access the event monitoring interface.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

The tabs of the event monitoring interface allow you to access information and take actions on specific areas of your event.

The event monitoring interface has two parts: the **Actions** menu and a set of tabs. The **Actions** menu allows you to take event-wide actions. The tabs allow you to monitor and interact with lots, bids, suppliers, and other elements of the event.

The bid clock in the top-right corner shows the event status. If a bidding period is open, it shows the time remaining. The event monitoring interface is refreshed every 20 seconds, except in Dutch auctions, where the interface is refreshed every five seconds.

For all tabs on the event monitoring interface, if any content has been restricted using the **Team Access Control** field, you can see that content only if you're in a group that has access.

- If the **Price** term isn't accessible, for example, the **Scenario** and **Award** tabs on the event monitoring interface don't appear. In this case, the term is missing from reports that typically contain it.
- You can't optimize scenarios if doing so requires a term you don't have access to.
- Access filtering includes the log, which amends entries about content to which you don't have access.

In envelope events, you can't see responses in unopened envelopes, and when participants are disqualified or discarded, all their previous responses are deleted unless **Keep the Rejected Envelope Bids** and **Discard Bids for Event Updating** are configured.

Procedure

1. On the dashboard search bar, click the content type menu to the left of the search field and select **Event**.
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 saved search filter from the filter menu to the right of the search field. The search starts automatically.

4. To open the event, select the event name in **Search Results** under **Title**, and in the menu that appears, select **Monitor**. To open the project, select the name under **Project**, and in the menu that appears, select **Open**.

   If the project isn't published, click **Exit** and select **View Details** from the **Confirm Edit Event Exit** page.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]
Team Access Control [page 161]

Updating Events

Use this procedure to update an event.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> For envelope events the only edit you can perform is to discard everyone's responses and start over. For other events, you can change anything about them. Some changes will remove existing responses from participants, for example, if you change the type of a term from **Number** to **Money**.

Context

To replace the published version of an event with changes made to a draft version, update the event.

If you make changes to the event after some or all participants have already submitted bids, you must choose what to do with the existing bids that were not already removed by your change, since some of the bids might have become invalid. For example, maybe you notice that you forgot to set a participant-specific initial value for some participants or you lowered the ceiling price on a certain lot. When you update the event, you have the option to notify the participants that you have changed the event, and you can decide to discard or keep participants' existing responses.

You can also update event content, participants, and buyer terms from a Microsoft Excel document [page 481]. This is useful if you have a lot of information to update.

Procedure

1. Choose ▶ **Actions** ▶ **Edit** ▶.
2. On the **Summary** page of the event wizard for the draft event, click **Update**.

> ⓘ Note
>
> You can also update the event by viewing the published version of the event and clicking **Update** in the warning message at the top of the page.

3. On the **Update Event** page, choose an option.
4. Choose **Keep and email** or **Do not keep, and email** to enter an optional personalized message. Your personalized message will be included in the Event Edited and Republished notification.
5. Click **Update Event**.

Results

The system immediately updates the event with your changes, unless you need approval before publishing an event. In that case, the system submits your updates for approval. When the appropriate person provides approval, the system updates the event with your changes.

The **Event Edited and Republished** notification is sent when you republish your event.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Updating Events from Microsoft Excel

If you have a published event with many changes, use this procedure to update the event with data from a Microsoft Excel document.

Context

You can update content and participants in a published event from the user interface [page 480] or an Excel document.

If you make changes to the event after some or all participants have already submitted bids, you must choose what to do with the existing bids that were not already removed by your change, since some of the bids might have become invalid. For example, maybe you notice that you forgot to set a participant-specific initial value for some participants or you lowered the ceiling price on a certain lot. When you update the event, you have the option to notify the participants that you have changed the event, and you can decide to discard or keep participants' existing responses.

> **Restriction**
>
> - You can only update the following items from an Excel document:
>   - Content
>   - Participants
>   - Buyer Terms
>
>   You cannot update rules or currency conversion specifications.
>   For envelope events, you must discard everyone's responses and start over. Some changes will remove existing responses from participants, for example, if you change the type of a term from **Number** to **Money**.

Procedure

1. Open the event monitoring page and select **Actions** > **Document** > **Edit**.
   The event wizard (editor) opens.
2. In the navigation panel on the left side of the page, select **Suppliers** or **Contents**.
3. From the **Invited Participants** or **Content** page, select **Excel Import**.
4. In Step 1 of the **Import Content from Excel** page, select the data you want to import.
   Because you are updating a published event, your choices are limited to:
    - **Content**
    - **Participants**
    - **Buyer Terms**
5. In Step 2 of the **Import Content from Excel** page, select **Click here to open your RFP in an Excel spreadsheet** (or **Click here to open your Auction in an Excel Spreadsheet**) to create an Excel document with the existing event information.
6. When the download completes, choose to either open the template in Microsoft Excel or save it, then open it. Edit the Excel document and save your changes.
    - To add line items, create entries in the **Pricing** worksheet. Leave the **System ID** column blank.
    - To delete an existing line item, locate the row with the item in the **Pricing** worksheet and enter **Yes** in the **Delete** column.
    - To modify an existing line item, locate the row with the item in the **Pricing** worksheet and change column values. Do not change the **System ID** column value.
    - To modify a term value for an existing item, change the value in the **Pricing** worksheet and the **Event Terms** worksheet.
7. Return to the **Import Content from Excel** page for simple Excel imports: Navigate to the **Content** page for the event and click **Simple Excel Import** at the bottom of the page.
8. In Step 4 of the **Import Content from Excel** page, select **Add/Edit to Event Content** (this is your only choice).
9. In Step 5 of the **Import Content from Excel** page, select your Excel document.
10. In Step 6 of the **Import Content from Excel** page, select **Import**.

11. Select **Exit** to exit the event editor.
12. From the monitor page for the event, select **Update Published Event**.
13. Review the pending changes. Select **Update**.
14. On the **Update Event** page, choose an option for handling the changes and notifications to participants.

    Choose **Keep and email** or **Do not keep, and email** to enter an optional personalized message. Your personalized message will be included in the Event Edited and Republished notification.
15. Click **Update Event**.

Results

The system updates the event with your changes, unless you need approval before publishing an event. In that case, the system submits your updates for approval. When the appropriate person provides approval, the system updates the event with your changes.

The **Event Edited and Republished** notification is sent when you republish your event.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Pausing and Resuming Events

Use this procedure to pause and resume an event.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

You might pause an event if:

- There is a bad bid in an event where competitor prices are hidden. This typically occurs when suppliers misunderstand the quantity on which they are bidding.
- A buyer requests that you pause the event due to lack of participation, confusion, or the need to run the event on another day.

- There are site performance issues that cause you to pause the event as a precaution.

Procedure

1. Choose **Action** > **Pause Event**.
2. To resume a paused event, choose **Action** > **Resume**.

Results

The clock stops and displays **Paused**. When an event is paused, neither participants nor **Surrogate Bidders** can submit bids. Participants are notified when the event is paused, and they only have read-only access to an event while it is paused. The event close time is extended by the paused period.

When you resume an event, the clock reappears and participants can submit responses. The application notifies participants that the event has resumed.

Pausing and Resuming Events Example

Suppose there is a reverse auction with only rank shown to competitors, and they are to bid on a total price for 1,000 chairs.

One supplier misunderstands the quantity involved, and submits a price per chair. This bid will be significantly lower than the rest of the market, and in first place. The second place supplier then starts dropping his bid to try to reach first place since he can only see his rank.

You want to pause the market to prevent chase bidding against a first place bid, and resume the event after removing the bid and chase bids.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Viewing a Sourcing Event as a Participant

Use this procedure to view sourcing events as a participant sees them.

Prerequisites

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)

Context

You can use **View As Participant** to view sourcing events as a participant sees them. This is important for supporting your participants during the sourcing event.

Procedure

1. To view a sourcing event as a participant, complete either of the following actions:
   - Use the **Actions** menu in the event monitoring interface.
     1. Select the **Actions** menu.
     2. Choose a participant from the **View As Participant** menu section.
   - Use the **Suppliers** tab in the event monitoring interface.
     1. Go to the **Suppliers** tab.
     2. Select a participant.
     3. Choose **View As Participant**.
2. To stop viewing the event as a participant, click **End Preview**.

Deleting Events

Use this procedure to delete an event.

Prerequisites

Only project owners can delete events. Your system can be configured to allow project owners to delete any project regardless of the state the project is in. To search and view deleted projects, you must be a member of the **Deleted DocumentsAccess** group.

> **Restriction**
>
> You cannot delete quick projects that are published or full projects with started tasks.

Context

By default, you can delete draft events and full projects with draft events that do not have any started tasks.

Procedure

1. Access an event.
2. Click **View Details**.

   The **Overview** tab displays.
3. Choose **Actions** > **Delete** .

Results

Deleted projects are inactivated, which means they cannot be searched and are not included in reporting, but they are not removed from the database.

Related Information

Understanding Event Tabs [page 422]
Using the Event Monitoring Actions Menu [page 475]

Updating Events [page 480]

Creating Event Templates

About Creating Event Templates

All events are created from templates, which define rules and the types of information (such as the types of pricing terms) for the event. SAP Ariba Sourcing provides a set of templates for the event types supported on your site. By default, there is only one template for each event type and new templates cannot be created. SAP Ariba can configure the site configuration parameter `Application.AQS.RFX.EnableCustomTemplates` for you to allow multiple templates.

Users must be members of the global **Template Creator** group or a template's **Template Creator** team to modify (or create) a template.

By default, users can create quick projects or full projects. SAP Ariba can configure the site configuration parameter `Application.AQS.AllowableProjectType` to restrict the project type and set the default type for new sourcing projects. For example, you may want all project owners to take advantage of the added process management functionality that full projects offer, so you configure SAP Ariba Sourcing to only allow project owners to create full projects. SAP Ariba Sourcing also automatically filters templates based on the project types you allow, so if you only allow full projects, SAP Ariba Sourcing will only display available full project templates.

Site configuration options are set for you by SAP Ariba. For more information about these options, see Site Configuration Options for Managing Events [page 561].

Related Information

Creating Event Templates [page 496]
Configuring Event Templates [page 498]
Requiring Approvals for Event Contents or Award Scenarios (Approval For Publish and Approval For Award Tasks) [page 503]

Configuring Automatically Add Preferred Suppliers [page 505]
Publishing Event Templates [page 506]
Site Configuration Options for Managing Events [page 561]

About Event Rules

Event rules control how the event works. For more information on the event rules you can include in an event template, see Event Rules Reference Guide.

When creating a template, you often have the option to withhold control of this rule from the person who is using the template to create an event, also known as the project owner. The options are:

- **Delegated**: The ability to edit this rule is delegated to project owners. When they create a project, they can see this rule and they are allowed to change the setting.
- **Read only**: When they create a project, project owners can see this rule and setting, but cannot edit it.
- **Hidden**: When they create a project, project owners cannot see this rule or how it is set.

If this option is absent, the project owner can control the rule setting. For project owners, this means they may read about rules in this section that do not appear in the template they are using because the template creator chose **Hidden**. Many of the rules that are Delegated or Read only are also exposed to event participants.

> Note
>
> SAP Ariba Contracts buyers integrated with an external ERP system 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. For more information, see About the Definitions Tab (Item Definitions in Templates) [page 490].

About Adding Suppliers to Event Templates

The **Suppliers** page is just a place holder; you cannot add suppliers to a template. The project owner adds them when creating an event from a template.

Related Information

Inviting Existing Suppliers to Events [page 57]

About Adding Content to Event Templates

The **Content** section of the template has two tabs, **Definitions** and **Content**. The **Definitions** tab allows you to create definitions for lots, a line item, and a cost term. Whenever a project owner creates these elements in the project, they look like the ones you define here.

The **Content** tab enables you to create certain content elements that appear in every project that uses this template. Content you create in a template become item templates. That means that any content you add to your project will look like the appropriate item template. When you create item templates, you can specify whether the element can be modified after being added to a project.

Related Information

Creating Event Content [page 76]

About the Definitions Tab (Item Definitions in Templates)

Definitions in templates allow template creators to create content according to terminology that may be specific to a given commodity. The template creator also has the ability to add custom formulas as part of the definitions in templates.

Lots

You can create one lot of each type. The types are:

- **Bid at Item level**, compete at lot level (collect item pricing during bidding)
- **Bid at lot level**, compete at lot level (collect item pricing post bidding)
- **Bid at lot level**, compete at lot level (do not collect item pricing)
- **Bid discounted value at item level**, compete at lot level (collect item pricing during bidding)

You can add terms and formulas to lots, but you can only add formulas if the formula rule is set to **Yes**. If you want to add a formula, but do not want to allow project owners to add formulas, set the rule to **Yes** and add your formulas. After you add your formulas, you can change the rule back to one of the **No** options.

You cannot add a line item to a lot definition. When the event creator adds line items to a lot, they are added using the Line item template, described in the following section.

Line Items

If no line item is defined in the project template, the project owner is free to create line items containing any terms required. Defining line items in templates makes it easier for project owners to add line items with a preselected set of terms.

The default line item contains these terms:

- **Price**
- **Quantity**

- **Extended Price**, with a formula of `'Price'*'Quantity'`

> ⓘ Note
>
> You can configure these terms to use pricing conditions by enabling the **Add term to Pricing conditions** rule available for a line item in the **Add Term** and **Edit Term** pages. For more information, see RFPs with Pricing Conditions [page 242]. When you configure the **Price** term to use pricing conditions, the **Extended Price** term is automatically configured to use pricing conditions. If you do not want to use **Extended Price** with pricing conditions, you can remove the **Extended Price** term from the event template and retain only the **Price** term.

You can remove these and replace them with other terms. However, if you have a project in which all your line items need to be different, it is easier to use a template with the proper line item predefined in the template, than to have to change each line item as you add it.

By default, the default value for a term defined in a template is not copied when a project is created from the template. An administrator for your site can set the site configuration parameter Copy default term values from template definitions [page 571] to copy the template default values for terms when the terms are used in projects.

> ⓘ Note
>
> - When terms are defined in a template and the template is published, the terms become global. This means that the terms will be available for use even for events that use different templates.
> - When creating a custom term in a template, ensure that you provide a unique name to the term to avoid replacing existing global terms.

You can define local terms that have the same name as global terms and those terms can have different **Answer Types** as well as **Acceptable Values**. When you import the template into another event, local terms (with the same name as a global terms), get imported correctly. However, the **Name**, **Answer Type** and **Acceptable Values** will be read-only after the import.

If you define a line item in the template, all line items created in a project using this template will look like that line item.

An example of a line item definition is when you change "Price" to "Hourly Rate" and "Quantity" to "Hours". The easiest way to do that is to edit each term and change the name. When you change the name of a term, the name is automatically updated in all the formulas and functions that use it.

In this example the **Extended Price** term, which uses the `'Price'*'Quantity'` formula is automatically updated to use the `'Hourly Rate'*'Hours'` formula. If you make a copy of the **Total Cost Auction** template and change the names of the "Price" and "Quantity" terms, the total cost automatically applies all the defined adders, subtracters, multipliers and discounts to `'Hourly Rate'*'Hours'`.

> ⓘ Note
>
> The terms **Price**, **Quantity**, and **Extended Price** are all designed to appear in reports. If you change their names to automatically update any the formulas they are in, they still appear in reports with the original names: **Price**, **Quantity**, and **Extended Price**.

If you select **Delegated**, it allows the project owner to change or delete the term when they use this template to create an event project. Unchecked means the project owner can still set the initial, historic, and reserve price, they just cannot change any formulas or remove the term.

However, if you are creating a template for a Dutch auction and you want to allow the owner the option of letting the participant set the quantity on which they bid, you have to select **Delegated**. Then the project owner, when creating the event, can say that the participant is required to respond. It also allows project owners to set a range of quantities, if they want to enforce a minimum or maximum quantity per bid.

The bidding rules for line items are unique to creating a line item in a template.

Extended Bidding Term controls the bidding term that is used when the buyer creates a line item that specifies "Participants bid on all units (extended bidding)." The **Extended Bidding Term** bidding rule defaults to **Extended Price**. You cannot select **None**.

Award Term specifies which term you can split up, if you want to award part of your business to different suppliers. Typically, this term is **Quantity**, so you can award part of the quantity term to another supplier.

Compete on Term specifies which term is monitored by the **Bid Guardian**, and the feature for automatically beating a bid.

Use initial value as can be none, Ceiling, Default, and Ceiling and Default. There may be instances where the auction uses the initial value as the target value for the initial bid.

Cost Terms – When you add a cost term to the **Definition** page, it becomes a prototype for any cost terms the buyer adds to the sourcing event project.

Service Items and Service Hierarchies

If you use the SAP RFQ and Award Integration with SAP Ariba feature, your organization can receive RFQs from SAP with service items and send award data back to SAP with service items. The sourcing request and event templates used for integration must have the following items defined:

- **Service Line**, with the following terms:
    - **Requisition ID**
    - **Requisition Item Number**
    - **RFQ ID**
    - **RFQ Item Number**

  The terms must have the following settings:
    - **Include in cost: No**
    - **Answer Type: Text (single line limited)**

  You can also add the following terms:
    - **Quantity** (if omitted, quantity is 1)
    - **Discount Amount** (**Answer Type: Money**)
    - **Discount Percentage** (**Answer Type: Percentage**)
    - **Surcharge Amount** (**Answer Type: Money**)
    - **Surcharge Percentage** (**Answer Type: Percentage**)

  The **Discount Amount**, **Discount Percentage**, **Surcharge Amount**, and **Surcharge Percentage** terms can be mapped to SAP pricing conditions. For information about price condition mapping, see RFQ and Award Integration with SAP Ariba Sourcing.

  > ⚠ Restriction
  >
  > If award data from an event is used to create an Outline Agreement (OA) on an SAP ERP, do not include **Discount Amount**, **Discount Percentage**, **Surcharge Amount**, and **Surcharge Percentage** terms for service lines.

- **Service Specification**. The required terms and term settings for service specifications are the same as the required terms for service lines (**Requisition ID**, **Requisition Item Number**, **RFQ ID**, **RFQ Item Number**). The optional terms and term settings for service specifications are the same as the optional terms for service lines (**Quantity**, **Discount Amount**, **Discount Percentage**, **Surcharge Amount**, **Surcharge Percentage**).

  > ⚠ Restriction
  >
  > If award data from an event is used to create an Outline Agreement (OA) on an SAP ERP, do not include **Discount Amount**, **Discount Percentage**, **Surcharge Amount**, and **Surcharge Percentage** terms for service lines.

  In addition, if your site is configured for alternative service line integration with SAP, add the following terms for service specifications if they are not already present:

  - **Service Line Type**
    Settings:
    - **Include in cost**: **No**
    - **Answer Type**: **Text (single line limited)**
    - **Acceptable Values**: **List of Choices**
    - **Allow participants to specify other value?**: **No**
    - **Allow participants to specify multiple values?**: **No**
    - **List of Choices**:
      - **blanket**
      - **contingency**
      - **information**
      - **openquantity**
      - **standard**
  - **Alternate Type**
    Settings:
    - **Include in cost**: **No**
    - **Answer Type**: **Text (single line limited)**
    - **Acceptable Values**: **List of Choices**
    - **Allow participants to specify other value?**: **No**
    - **Allow participants to specify multiple values?**: **No**
    - **List of Choices**:
      - **noAlternative**
      - **basicLine**
      - **alternativeLine**
  - **Alternate To Item**
    Settings:
    - **Include in cost**: **No**
    - **Answer Type**: **Text (single line limited)**
    - **Acceptable Values**: **List of Choices**
    - **Allow participants to specify other value?**: **No**
    - **Allow participants to specify multiple values?**: **No**

Read-Only Terms in External System Templates (Contract Line Item Templates)

SAP Ariba Contracts buyers integrated with an external ERP system 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. Buyers integrated with an external ERP system can also do the following:

- Mark the line item term definitions as read-only terms for the external system
- Specify whether the read-only terms are applicable for contracts, sourcing, or both contracts and sourcing using the **Read-only term applicability** attribute

Buyers can override the read-only terms for the line-item definition while creating or editing the contract that was created against a sourcing event or an award. SAP Ariba Contracts allows buyers to override the read-only terms for the line-item definitions for external systems based on the group permission, **Override Read-only Terms in Contracts Templates**.

You can make changes to the line item definitions in the contracts template (contract line item template for external system or contract workspace template) only for the newly created contracts.

Although you can update and make changes to the contract templates, SAP Ariba Contracts does not support the updates done to the line item definitions in contract templates for existing contracts.

When buyers create a sourcing template or contracts template and specify line item term definitions as read-only, buyers can also specify whether the read-only terms for line item term definitions must apply for contracts, sourcing, or both contracts and sourcing. SAP Ariba Contracts allows buyers to specify the attribute, **Read-only term applicability** to identify how the line-item terms must apply.

When buyers enable the **Read-only term applicability** attribute for line items from external systems in the contract template, buyers can do the following:

- Export and import the read-only fields using the following:
  - Import contract line items document (CLID) using XML
  - Import contract line items using web services

> ⓘ Note
>
> If you import contract line items with the read-only attribute using Microsoft Excel, SAP Ariba does not import the read-only field.

When buyers create a contract from a sourcing award, buyers can specify whether the line item terms must be editable or set to the read-only attribute. SAP Ariba Contracts applies the setting that you specify while creating a contract from a sourcing award; the **Read-only term applicability** attribute from the sourcing template is not applied.

About the Content Tab

In addition, you can create the following content:

- **Section**
- **Question**

- **Requirement**
- **Attachment**
- **Cost Terms**
- **Formula**
- **Content From Library**

Although most content is specific to each event, there are still some content questions and specifications that might be common to many events of this type. Some common questions might be whether the company is an equal opportunity employer, minority owned, or willing to sign a non-disclosure agreement.

Content elements you create on the **Content** tab are common to every project.

- Creating an item is the same as in a project, except for these differences.
- You can only create formulas if the Initiator Action rule for creating formulas is **Yes**. However, if you do not want formulas enabled in the project you can set this rule to **Yes** until you have all the formulas you need in the template, and then set the rule to one of the **No** options before you publish the template.
- If you want to create cost terms, you must create a cost term definition on the **Definitions** tab and all the cost terms you create on the **Content** tab have to match it. The **Content** tab allows you to change the cost terms you create so that they do not match, but if you do, an error appears on the Summary page and you cannot publish the template until all the cost terms match the prototype on the **Definitions** tab.
- The **Team Access** control has no effect in the template. It is there so that the control will be present in the event you build from the template. **Team Access** settings in the template are not carried into the event.
- If an article master file was uploaded, when adding a section on the Contents tab of a RFX document on a sourcing project template, the **Include Category Questions in this Section** field is displayed. If this field is set to Yes, this section will contain any questions associated with items that are added to a sourcing project from the article master.
  This field is only available on one section in any given template. For example, if you set it to Yes in one section and you then add another section, the field is not displayed on the second section. To display the field on the second section, you must edit the first section and set the field to No there. For more information about article master, see Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.
- When creating a sourcing event template that contains a lot of type **Basket – Bid at Lot Level (collect item pricing post bidding)**, the **Link Item** field is displayed. When **Yes** is selected for this field sourcing event line items can be copied to a lot from outside the lot.
  This allows users to link items to lots such that a supplier only needs to bid on an item once and the pricing for that bid is extended to lots that have the item linked.
- In a guided sourcing template, all sections that you add on the **Content** tab are applied to the **Questions, requirements, and attachments** table in guided sourcing projects created from this template. If you want to add sections to both the **Items that need quote** and **Questions, requirements, and attachments** tables in your guided sourcing projects from a template, set the ICM parameter **Distinguish section types in guided sourcing templates** (`Application.AQS.GuidedSourcing.DistinguishSectionTypesInGuidedSourcingTemplates`) to **Yes**. When you set this parameter to **Yes**, the **Section Type** field is displayed on the **Add Section** or **Edit Section** page when you add or edit a section on the **Content** tab of a guided sourcing template. You can select **Items or lots** or **Questions, requirements, or attachments** for the **Section Type** field to specify what kind of content you want to include in the section in guided sourcing projects created from this template. If you select **Items or lots**, then only items and lots can be included in the section. If you select **Questions, requirements, or attachments**, then only questions, requirements, and attachments can be included in the section.

> ⓘ Note
>
> At the template level, **Items or lots** sections can't contain any specific items or lots. You need to add items or lots to these sections in your sourcing projects. On the contrary, **Questions, requirements, or attachments** sections can contain specific questions, requirements, or attachments, and the content is applied to every sourcing project created from this template.

Related Information

Distinguish section types in guided sourcing templates

About the Event Template Summary Tab

You use the event template **Summary** section to review the template settings. When you are satisfied, click **Exit** and then **return to project**. There are three actions you can take:

- **Edit Overview**
- **View Publish Approval Task**
- **View Team Grading Task**
- **Customize Messages**
- **Print Event Information**

The **Edit Overview** page enables you to edit the title and description, which you initially set when you created the project. You generally do not need to change any of the settings on this page.

The **Customize Messages** page enables you to select one of the standard notification messages and change the subject line and content.

Creating Event Templates

Use this procedure to create an event template.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Only a representative from SAP Ariba Customer Support can enable and configure the default project type functionality. By default, this functionality is disabled. This functionality applies to all users with the permission to create sourcing projects.

Restriction

By default, SAP Ariba Sourcing makes new RFP templates competitive and sets the rule **Must participants improve their bids** to **Yes**. If you want the ability to add envelopes to your RFP template, you must set the rule **Must participants improve their bids** to **No**.

Note

Creating templates is a separate feature. To enable this feature, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will follow up to complete the request.

Context

When you create event templates, you can choose to make the template for a **Quick Project** or a **Full Project**. A **Quick Project** is a sourcing event such as an **RFI**, **RFP**, or an **Auction** (forward or reverse). If you choose to create a **Quick Project**, then you will create a project containing only an event template. A **Full Project** enables you to create a project with process management capabilities turned on.

When a project owner creates an event, they get to select the event type. When they do, the event templates that appear for that event type are those that match the event type specified here when the template was created.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. From the **Documents** tab on the **Templates** page, select **Actions**, on the right.
3. From the **Actions** menu, choose **Create** > **Template**.
4. From the **Select Project Type for Template** page, click **Sourcing Project** and click **OK**.
5. Provide a name and a description for the template project.
6. Choose the **Base Language**. The **Base Language** is used when there is no version of the template in the user's language.
7. Enter the **Name** and **Description** for the template.
8. Choose **Quick Project** or **Full Project.**
9. Specify the event type from the pull-down menu. The choices are RFI, RFP, Auction, or Forward Auction.
10. Click **OK**. The template now exists.

Related Information

About Creating Event Templates [page 488]
Configuring Event Templates [page 498]
Publishing Event Templates [page 506]

Configuring Event Templates

Use this procedure to configure event templates.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Only a representative from SAP Ariba Customer Support can enable and configure the default project type functionality. By default, this functionality is disabled. This functionality applies to all users with the permission to create sourcing projects.

> ⚠ Restriction
>
> Creating templates is a separate feature. To enable this feature, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will follow up to complete the request.

Context

A template consists of rules, a place for the project owner to specify suppliers, content such as questions, and a summary. While configuring a template, you configure each of these steps in a separate operation.

Procedure

1. Click the template name in the **Documents** section.
2. Choose **Action** > **Edit**.

Next Steps

You are now ready to add rules and content to your template.

Related Information

About Creating Event Templates [page 488]
Creating Event Templates [page 496]

Configuring Event Templates for Alternative Bidding

Use this procedure to configure an event template for alternative bidding. Alternative bidding allows participants to submit alternate bids after they've submitted a primary bid.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

If your site wants to limit and control how and when alternative bidding is allowed, a template author (user with **Template Creator** capabilities) configures alternative bidding rules in an event template.

For more information about alternative bidding, refer to Alternative Bidding [page 225].

For more information about alternative bidding rules, refer to Event Rules Reference Guide.

Procedure

1. Open an event template for editing or create a new event template.
2. Configure event rules for alternative bidding.
    a. Go to the **Rules** area in the event template.
    b. Set the **Specify how lot bidding will begin and end** bidding rule to **Parallel**.
    Alternative bidding only works with parallel bidding.
    c. Set the **Can participants create alternative responses** bidding rule to **Yes**.
    d. Set the following alternative bidding rules, which appear after you choose **Yes** for **Can participants create alternative responses?**:
        - **Can participants create alternative pricing?**: Set this to **Yes** to allow participants to specify alternative pricing values in alternative responses.
          If you want to enable pricing conditions-based alternative pricing, set the **Allow pricing conditions** rule to **Yes** and the **Can edit pricing condition terms in alternatives** rule, which appears when the **Allow pricing conditions** rule to **Yes**, to **Yes**. For more information, see Enabling Pricing Conditions-Based Alternative Bids in the Classic UI of SAP Ariba Sourcing [page 235].
        - **Can participants create bundles?**: Set this to **Yes** to allow participants to create bundles and add line items to the bundles in alternative responses.
        - **Can participants create tiers?**: Set this to **Yes** to allow participants to create volume tiers in alternative responses.
    e. If you have the SAP Ariba Strategic Sourcing Suite, set the following rules:

- **Should questions be visible in alternatives?**: Set this to **Yes** to allow questions to be visible to suppliers when adding alternative responses.
- **Should there be a limit on number of alternatives?**: Set this to **Yes** to enforce a limit to the number of alternative responses that a supplier can provide. Enter the limit maximum value in the **Alternative limit value** field.
- **Allow supplier to add items**: Set this to **Yes** to allow suppliers to add items.

> ⓘ Note
>
> If **Allow supplier to add items** is set to **Yes**, the **Maximum supplier-added items for each supplier** and **Allow supplier-added items only in alternative bids** rules become visible.

3. Modify or create the line item definition in the template to let participants modify a term value in alternative bids (such as the **Price** term, to allow pricing alternatives).
   a. Open the **Content** area of the template and select the **Definitions** tab.
   b. If no line item defnition exists, select **Add** > **Line Item**. If a line item definition exists, select it and click **Edit**.
   c. On the **Add Item** or **Edit Item** page, navigate to the **Item Terms** area.
   d. If the term you want to let participants modify is present, select it and click **Edit**. Otherwise, select **Add** > **Term**.

      If you select **Add** > **Term**, the **Add Term** page opens. To add and edit an existing term, choose a term below the **Available Terms** tab. After you add the term, return to the **Item Terms** area, select the term and click **Edit**.

      To add a new term, select the **New Term** tab.
   e. In the **Is term editable in alternatives?** field, choose **Editable By Owner and Participant**.

      The **Is term editable in alternatives?** field is visible only when the bidding rule **Can participants create alternative responses?** is set to **Yes**.

      After you choose **Editable By Owner and Participant** the **Can participant edit term's primary response?** field appears. Choose **Yes**.

      > ⓘ Note
      >
      > You can view the **Quantity** term in the supplier column of the bid comparison report only when **Can participant edit term's primary response?** is set to **Yes** and **Is term editable in alternatives** is set to **Editable by Owner and Participant**.
      >
      > When `Application.AQS.RFX.EnableIsTermEditableInAlternativesToEditableByOwnerAndParticipant` parameter is enabled, the default value for **Is term editable in alternatives** is set to **Editable by Owner and Participant** and suppliers can edit the questions added at the event level in the alternative responses. Contact SAP Ariba Support to enable this parameter.

4. **Optional:** Configure the event to include alternative bids in bid rankings.

   You can make it easier to compare alternative bids against primary (standard) bids by setting the event rule **Include alternative pricing bids when bids are ranked** to **Yes**.

   To set **Include alternative pricing bids when bids are ranked** to **Yes**, event rules must be configured as follows:

- The following event bidding rules must be set to **Yes**:
  - **Can participants create alternative responses**
  - **Can participants create alternative pricing**
- The following event bidding rules must be set to **No**:
  - **Allow Bidding Overtime**
  - **Enable Traffic Light Bidding**
- The event bidding rule **Can participants submit tie bids** must be set to one of the following values:
  - **Break tie bids by submit time**
  - **Allow tie bids for all ranks**
- If **Must participants improve their bids** is set to **Yes**, the following market feedback rules must be set to **No**:
  - **Show lead bid to all participants**
  - **Can participants see ranks**

For more information about including alternative bids in bid ranking, refer to Including Alternative Bids in Bid Ranking [page 228].

Configuring Event Templates for Supplier-Added Items

Use this procedure to configure an event template for supplier-added items. To create events that allow supplier-added items, your site must have event templates with the appropriate settings and definitions.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

To create a template that allows supplier to add items to events, you set event rules. You can also set rules that:

- Specify the maximum number of items each supplier can add
- Limit supplier-added items to alternative bids

In addition, you can create a definition (prototype) specifically for items added by suppliers. For example, you might create a definition for supplier-added line items that allows suppliers to modify the quantity, even if you do not allow suppliers to modify the quantity in normal line items.

Procedure

1. Open an event template for editing or create a new event template.
2. Open the **Rules** area of the template and set the following event rules to **Yes** (or delegate them):
   - **Allow suppliers to add items**
   - **Maximum supplier-added items for each supplier**

   By default, suppliers can add items in primary and alternative bids. To restrict supplier-added items to alternative bids, set the following event rules to **Yes**:
   - **Can participants create alternative responses?**
   - **Allow supplier-added items only in alternative bids**

   (The rule **Allow supplier-added items only in alternative bids** is only available when the rule **Can participants create alternative responses?** is set to **Yes**.)
3. Add definitions for supplier-added items.
   a. Open the **Content** area of the template and select the **Definitions** tab.
   b. Add a definition for supplier-added line items. Select **Add** > **Supplier Line Item**.

   If you do not create a **Supplier Line Item** definition (prototype), supplier-added line items use the buyer **Line Item** definition. In most cases, you will want to create a **Supplier Line Item** definition so you can create terms that are different for supplier-added items. By default, the definition includes the **Price**, **Quantity**, and **Extended Price** terms.

   > Note
   >
   > If the **Allow supplier-added items only in alternative bids** rule is set to **Yes**, and you want to allow suppliers to be able to specify a value (such as for the **Price** and **Quantity** terms) in alternative bids, the term option **Is term editable in alternatives** must be set to **Editable By Owner** and **Participant**.

   c. To allow suppliers to add lots or service items, add a definition for supplier-added line items with children or for supplier-added service hierarchies. Select **Add** > **Supplier Line Item** > **Supplier Item with Child Items or Service Hierarchy**.

   The **Lot Type** for **Supplier Item with Child Items or Service Hierarchy** definitions is **Basket with No Items - Bid at Lot Level, Compete at Lot level (do not collect item pricing)**.

   By default, the **Supplier Item with Child Items or Service Hierarchy** definition includes the following terms:
   - **Extended Price**.
   - **Child items or service hiearchy document**. This is an attachment that suppliers can use to upload a document which describes the child items or service hierarchy. This term cannot be deleted.

     > Note
     >
     > The attachment can be in any format. SAP Ariba Sourcing does not create child items or a hierarchy from the attachment.

   If you do not create a **Supplier Item with Child Items or Service Hierarchy** definition, suppliers can't set the **Is this a group of items or services** option to **Yes** when adding new lots. This effectively restricts suppliers from creating supplier-added lots or adding service items.

Related Information

[Creating Event Templates [page 488]](#)
[Supplier-Added Items in Events [page 253]](#)
[Alternative Bidding [page 225]](#)

Requiring Approvals for Event Contents or Award Scenarios (Approval For Publish and Approval For Award Tasks)

Use this procedure to configure **Approval For Publish** and **Approval For Award** tasks to require approvals for event contents and award scenarios.

Prerequisites

You must be able to create or edit templates, by being a member of the global **Template Creator** group or the template project's **Templates Creator** team.

Context

You can configure the following tasks in templates to require event contents or awards to be approved:

- **Approval For Publish**: This task prevents event contents from being published until the contents are approved. If this task is configured, it is automatically submitted when an event administrator clicks **Submit** from a draft event.
  By default, the **Approval For Publish** task is optional and can be removed by the event owner.
  If you select the **Repeat For Each Document Draft** option for an **Approval For Publish** task, a new publish approval task starts when a user submits changes for a published event. When an **Approval For Publish** task is created for a new version of a published event:
    - Approvers can view the event details and select the **Actions** > **Version** > **View Draft Changes** option to open the **Event Changes** page with a summary of the event changes that includes entries for deleted, added, or updated items and entries for deleted or added participants.
    - If email approvals are enabled for your site, the notification sent to email approvers for the task includes a document with a summary of draft event changes.
      If email approvals are not enabled for your site, an administrator can enable the self-service site configuration parameter Send draft changes for published events to all users [page 579] to include the summary of draft changes in the notification sent to approvers.
    - External Approval API for Sourcing and Supplier Management information for **Approval For Publish** tasks and events that contain an **Approval For Publish** task for a published event include a summary of draft event changes.

> ⓘ Note
>
> If the **Bypass approvals for edits to published events** parameter is set to **Yes**, no **Approval For Publish** task is created for a new version of a published event. The default value for this parameter is **No**; for more information about this parameter, see Bypass approvals for edits to published events [page 569]. For information about managing parameters, refer to Intelligent Configuration Manager Administration.

- **Approval For Award**: This task prevents an award from being created until the award scenario is approved. If this task is configured, it is automatically submitted when the event administrator clicks **Submit for Award** from an award scenario.
  By default, the **Approval For Award** task is required and cannot be removed by the event owner.

An **Approval For Publish** task is automatically submitted when a user (event administrator) attempts to publish an event; similarly, an **Approval For Award** task is automatically submitted when an event administrator attempts to create an award. If there are no incomplete predecessor tasks or phases and the approval flow for the task contains at least one approver, the task automatically starts. However, if an Approval For Award task has incomplete predecessor tasks or phases or the approval flow is empty, the user sees one of the following messages:

- **Before you can submit this scenario for award approval, you must complete one or more of its predecessor tasks or phases. View award approval task**
- **Before you can submit this scenario for award approval, you must add approvers.**

Clicking **View award approval task** or **add approvers** takes the user to the approval task page, where the user can view the predecessor tasks or phases or add approvers to the approval flow. When all predecessor tasks or phases are complete and the approval flow contains at least one approver, the user can return to the event and submit the scenario for awarding.

To allow users to submit **Approval For Award** tasks directly from the task page, you can set the parameter Allow users to submit Approval for award tasks from task page [page 569] (`Application.AQS.RFX.CanSubmitAwardApprovalFromTaskPage`).

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. From the **Documents** tab on the **Templates** page, click the name of the event template for which you want to create an event task.
3. If the template is not open for editing (the template status is not **Draft**), navigate to the **Properties** area and select **Actions** > **Template** > **New Version**.
4. Navigate to the **Documents** area. Click the name of the event and select **Create New Task** > **Approval For Publish** or **Create New Task** > **Approval For Award**.
5. On the task page, 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. To add parallel or serial approvers directly in the **Approvers** field:
     - Click the arrow for the **Approvers** field to open a chooser for users and groups, or manually enter a user or group name.
     - Click the radio button next to **Parallel** or **Serial** to specify the type of approvers you want to add. By default, the type is **Parallel** (all approvers are asked to approve at the same time).

- Open the approval flow editor by choosing a type in the **Approval Rule Flow Type** area and click an approval flow icon (such as). The approval flow editor has many features and is best suited for complex approval flows.
  For more information about approval flows and the approval flow editor, see Managing Projects, Teams, Documents, and Tasks.

6. **Optional:** Specify any other options for the task.

   If you set the **Required** option to **No**, the event owner can withdraw the task and the approval task is bypassed; no approval is needed to publish the event (for an **Approval For Publish** task) or to create the award (for an **Approval For Award** task).

   To automatically start an **Approval For Publish** task when changes are submitted for a published event, select the **Repeat for Each Draft** option.
7. **Optional:** Add a visibility condition to the task. For example, you could define a condition so that the task is visible (present in an event) only if **Baseline Spend** exceeds a certain value or for specific event owners.
8. Click **OK**.
9. Navigate to the **Overview** tab. Click **Actions** > **Template** > **Publish**.

Results

The task you created is added to all events created from the template.

Configuring Automatically Add Preferred Suppliers

Use this procedure to configure a template to automatically add preferred suppliers.

Prerequisites

SAP Ariba Supplier Lifecycle and Performance is required to use this feature.

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Buyers can see the supplier qualification status based on region and commodity for an event. They can also automatically invite preferred suppliers to events or line items based on the commodity and region specified during the event creation process.

Before you can use an event template you have to change its status from **Draft** to **Active**. This is called "publishing" the template. If you get a message that you cannot publish your template until you correct all the errors, edit the template and go to the **Summary** page. The errors appear in a gray box at the top of the page.

Procedure

1. Before publishing the template, go to the **Supplier Eligibility Criteria** rules section.
2. Choose a supplier status from the **Minimum supplier status for event participation** pull-down menu.
3. Choose a supplier status from the **Minimum supplier status for award eligibility** pull-down menu.
4. Choose **Event Level** or **Item Level** from the **Supplier qualification level** pull-down menu.
5. Choose **Invite to Event** or **Invite to Item** from the **Automatically invite preferred suppliers** pull-down menu.

   If you choose **No**, the preferred suppliers are not automatically invited.

   If the **Supplier qualification level** is set to **Event Level**, you see choices for **No** and **Invite to Event**.

   If the **Supplier qualification level** is set to **Item Level**, you see choices for **No** and **Invite to Item**.
6. Return to the template project page when you have configured the template fields as needed.
7. Choose **Properties** > **Action** > **Publish**.

Next Steps

You can now create events with preferred suppliers automatically added at either the event or item level using the published template.

Publishing Event Templates

Use this procedure to publish an event template.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Only a representative from SAP Ariba Customer Support can enable and configure the default project type functionality. By default, this functionality is disabled. This functionality applies to all users with the permission to create sourcing projects.

> **Restriction**
> Creating templates is a separate feature. To enable this feature, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will follow up to complete the request.

Context

Before you can use an event template you have to change its status from **Draft** to **Active**. This is called “publishing” it. If you get a message that you cannot publish your template until you correct all the errors, edit the template and go to the **Summary** page. The errors appear in a gray box at the top of the page.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. From the **Templates** page, click the name of the template whose status you want to change and choose **Open**.
3. In the **Properties** section, click the **Actions** menu and choose **Publish**.
4. Click **Exit** to return to the **Templates** page.
5. The status of this template is now changed to **Active** and you may now use it to create events.

Related Information

About Creating Event Templates [page 488]
Creating Event Templates [page 496]
Configuring Event Templates [page 498]

Using Large-Capacity RFPs

About Large-Capacity RFPs

Large-capacity RFPs are non-competitive RFPs that can contain up to 10,000 line items. You must have SAP Ariba Strategic Sourcing Suite to create large-capacity RFPs. (Customers who purchased SAP Ariba Sourcing prior to May 2016 can also create large-capacity RFPs).

Large-capacity events are Request for Proposal (RFP) events that can contain up to:

- 10,000 line items
- 700 suppliers
- 50 terms per line item

Contents for large-capacity events are accessed using Excel spreadsheets and are not directly visible in the user interface. Event managers create and edit contents using Excel spreadsheets, and participants submit responses using Excel spreadsheets. Event managers must also use Excel spreadsheets when allocating items in manual award scenarios for large-capacity events or selecting items in optimization scenarios for large-capacity events.

The type of event capacity is specified in the event template. Large-capacity events are only supported for non-competitive events (the event rule **Must participants improve their bids** must be set to **No**). Although contents for large-capacity events are not visible in the user interface, event managers can use options under the **Report** tab in events to generate Excel files with bid reports and view summary information about the event.

For information about inviting 700 suppliers to a large-capacity event, see Inviting Participants for a Large-Capacity Event [page 56].

Restrictions

Large-capacity events have the following restrictions:

- Custom formulas are not supported. The rule **Can project owner create formulas** is set to **No** and is not visible.
- The values for calculated terms are shown on the **Pricing** worksheet, but the formulas for calculated terms are not shown on the **Pricing** worksheet. The formulas are shown only on the **Terms** worksheet.
- Matrix terms are not supported. Values are not summed up (rolled up) for matrix terms.
- Buyers cannot configure initial bids for participants. You cannot set the **Initial Bid** option for participants and the **Set Participant-specific Values** option is not available.

- Grading and scoring is not supported. You cannot assign scoring points or grade suppliers.
- Envelope bidding is not supported. You cannot create envelopes. The **Envelope Rules** section is not present in templates for large-capacity events.
- Conditional event content is only supported for regular questions. You cannot create event conditions or set visibility conditions for prerequisite questions. Large-capacity events can contain up to 50 questions with visibility conditions.
- Participants cannot submit responses that include attachments. Questions with the **Answer Type** set to **Attachment** are not supported.
- Information about individual line items is not sent to SAP Ariba Analysis for reporting. For large-capacity events, a summary of the items is sent to SAP Ariba Analysis.
- Maximum number of suppliers a buyer can invite to a large-capacity sourcing event is 700.
- SAP Ariba supports only a maximum of 125 bid responses for a large-capacity sourcing event with 700 suppliers.
- Service items and service hierarchies aren't supported for use in large-capacity RFPs.
- Participants in large-capacity events cannot select bidding currency and must submit bids in the currency selected by the event manager.

Workflow for Large-Capacity Events

- An event manager creates an RFP using a template for large-capacity events.
- The event wizard opens. The event manager optionally adds participants from the **Suppliers** page in the event wizard. Alternatively, the event manager can add suppliers by entering the suppliers on the **Participants** worksheet of the Excel file used for adding line items in the next step.
- On the **Contents** page, the event manager creates an Excel template with the needed line-item terms by:
  - adding one or more sample line items with the desired terms in the field-based user interface
  - generating and downloading an Excel file (a template) from the sample data
- The event manager adds items to the **Pricing** worksheet of the Excel template. The event manager can also specify terms, event participants, line item participants, reserve price, and rules in the Excel template.
- Optionally, the event manager can add currency exchange rates on the **Currency Conversion** worksheet and define visibility conditions for questions on the **Conditions** worksheet.
- The event manager uploads the edited Excel template to the event and the file is validated and submitted for processing. It can take several minutes for the file to be processed. A page with the processing status opens. The event manager can return to the dashboard. SAP Ariba sends an email notification to the event manager when the file is processed. If the event manager remains signed in, they also receive an instant notification when the file is processed. Event managers cannot update any event components (contents, rules, or participants) while the Excel file is being processed. If the event manager attempts to update the event or start the event wizard while the Excel data is being processed, the processing status page opens.
- The event manager completes specifications for the event and publishes the event.
- When the event is open, the participants:
  - complete event prerequisites
  - answer conditional questions on the **Conditional Questions** page
  - download the event contents to an Excel file
  - edit the Excel file and add responses

    - upload their edited Excel file
- The uploaded response file is validated and submitted to a queue for processing. Response files are processed in the order they are submitted. It can take several minutes for the file to be processed. The participant receives an email notification when the file is processed. If the participant remains signed in, they also receive an instant notification when the file is processed.
- Response files are accepted until the event closes. If the event closes and response files have been submitted but not processed, the event remains **Closed** (no additional responses are accepted and the time remaining is 00:00:00) but does not change to the **Pending Selection** state until all responses that were submitted before the event closure time are processed.
- If the RFP contains lots that require lot reconciliation, or lots with the lot type **Basket - Bid at Lot Level, Compete at Lot Level (collect item pricing post bidding)**, the suppliers must download, edit, and submit Excel files for lot details responses.
- The event manager can view participants' bids by generating a bid report, such as a **Full Bid Report**. The event manager can create bid reports at any time. For example, the event manager can generate a bid report while the event is open to monitor the event, or when the event is in the pending selection state to evaluate bids for awards.
- After the event closes and is in the pending selection state, the event manager creates scenarios for awards. For manual scenarios, the event manager downloads an Excel file, edits the file to specify award amounts, and uploads the edited Excel file. The event manager must also use an Excel file when creating an optimization scenario if the event manager wants to select a subset of the event items for the scenario.

Best Practices for Large-Capacity Events

- Tell your participants to allow additional time to generate, view, edit, and submit bids. Tell participants to **not** wait until the closing minutes of an event to submit bids.
- If you are editing a large-capacity event that already has contents, ensure that you editing the most recent contents by clicking the **Download content** button.
- To get accurate **Rank** and **Leading** bid information in an event report, generate the report after the event closes.

Creating Large-Capacity RFPs

Use this procedure to create a large-capacity RFP.

Prerequisites

- Your site must have a template for large-capacity RFPs.
- 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)

Context

> **Restriction**
>
> You cannot use the user interface to search for and add item master data directly to large-capacity events. You can search for and add the items to a standard-capacity event and export the contents to Excel. Then, add the Excel rows with item master data to an Excel file for the large-capacity event.

Procedure

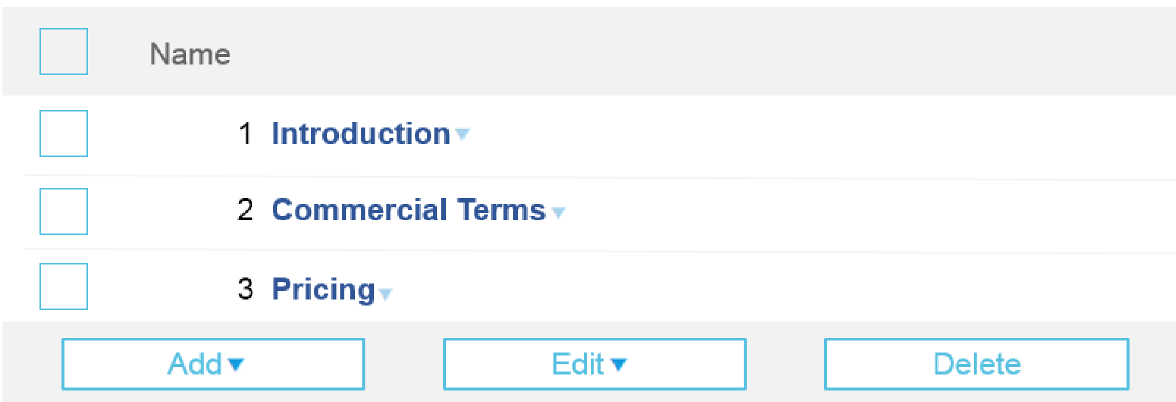
1. If the RFP does not already exist, create it.
   a. In **Common Actions**, click **Create** > **Sourcing Project**.
   b. On the **Create Sourcing Project** page, enter a name and description for your event.
      You can enter an unlimited number of characters in the **Name** and **Description** fields. Other fields might limit you to 255 characters.
   c. If you want to copy another project, choose the project or event you want to copy from the **Copy from Project** pull-down menu. The option **Do you want to copy project groups that were not in the template, from the project being copied?** appears at the bottom of the page. Select **Yes** to import the project groups defined in the project or event you are copying.

      SAP Ariba Sourcing automatically sets the event type and template to match the project or event you are copying. You can then modify the data you have copied.
   d. If you are an SAP Ariba Sourcing Pro user, select the project type (**Full Project** or **Quick Project**).
      A full project can contain one or more sourcing events and includes additional project management features. If you select **Full Project**, you complete the creation of the full project, then create the RFP by navigating to the **Documents** area of the project and selecting **Actions** > **Create** > **Event**.
      If you select **Quick Project**, select **RFP** in the **Event Type** field.
   e. Select a template for the large-capacity RFP (or full project, if you are creating a full project to contain your RFP event).

f. Click **Create**.

2. If the event is not already open, click the event name in the **Documents** area and choose **Open**.
3. In the event wizards, enter values on the **Rules**, **Team**, and **Suppliers** pages. Continue to the **Contents** page.
4. If this is the first time you are adding content, you will see an **Enter sample data** area. Enter sample data to create an Excel template with the format required by SAP Ariba Sourcing. Add at least one line item with the terms you want to use so the template contains entries for the terms. If you want sections or questions in the event, add at least one section or question.

> ⓘ Note
>
> The items 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 event.
>
> By default, the maximum number of sample items must be less than 50.



a. Choose **Add** > **Line Item**.
b. In the **Add Item** page, enter a name for the item.
c. **Optional:** Add a description. Specify the commodity, bidding rules, and any access control restrictions.
d. Enter values for terms, such as **Price**, **Quantity**, and **Reserve**.
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.
f. **Optional:** Click **Add Participants** to add specify event participants for this line item.
g. Click **Done**.
h. **Optional:** If you want to have sections in your event, add at least one section. Choose **Add** > **Section** and complete the information for the section. If you want to have other non-item content in your event, such as questions, add at least one instance of the content by clicking **Add** and choosing the appropriate content type, such as **Question**. Specify information for the additional content and click **Done**.
i. **Optional:** If you want to add conditional questions to your event, choose **Add** > **Question** and complete the information for the section. **Is this a prerequisite question to continue with the event?** must be set to **No**. You cannot create event conditions or set visibility conditions for prerequisite questions. Click **none** next to the **Visibility Conditions** attribute. Choose **Create Condition**. The Create Condition dialog box lists all available questions that you can use to build a condition. Specify information for the additional content and click **Done**.

5. Click **Download content** to generate an Excel template for the event. When SAP Ariba has finished generating the template, a browser dialog box opens with access options for the template file. Click **Open** or **Save**.

6. Open the Excel template and edit it according to the instructions on the **Design Instructions** worksheet in the template. Add items on the **Pricing** worksheet. Leave the **System Id** column blank.
7. Save the Excel file on your file system.
8. Click **Import Content**.

   The **Import Content from Excel** page opens.
9. Select the type of event data you want to import, such as **Contents**.
10. Select how you want to import the content (add to the content or replace the existing content).
11. Select your Excel document with the event content (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
12. Click **Import**.
    SAP Ariba checks the Excel file for errors. If the file contains errors, you will see the message **The Excel import request failed**. Click the **Download file with error details** link. Open the file and go to the **Error** worksheet to view the errors.

    If the Excel file is valid, a **Status for pending content change** page opens that shows the status of your Excel import request and a progress bar.

    You do not have to keep this page open while your import request is being processed; you can click **Return to dashboard**. When your Excel import has been processed, you can return to the event wizard by clicking **edit event**. The **Content** page contains a section that lists the number of items, sections, and questions loaded.

Related Information

Site Configuration Options for Managing Events [page 561]
Creating Event Content [page 76]
Event Terms [page 120]

Editing Large-Capacity RFPs

Use this procedure to edit a large-capacity RFP.

Prerequisites

You must be the event owner or have project owner capabilities for the event.

Context

To edit the contents of large-capacity RFPs, you must modify an Excel version of the event contents. SAP Ariba recommends that you create at least one entry of each item type you want to use in the sample data to create prototype entries that you can copy and modify in the Excel file as described in Creating Large-Capacity RFPs [page 510].

Procedure

1. If the event is not already open, click the event name in the **Documents** area and choose **Open**.
2. Open the content page by clicking **Content** in the left menu.
3. Click **Download content** to generate an Excel template for the event. When SAP Ariba has finished generating the template, a browser dialog box opens with access options for the template file. Click **Open** or **Save**.
4. Open the Excel template and edit it according to the instructions on the **Design Instructions** worksheet in the template. Edit items on the **Pricing** worksheet.
    - To delete an item, enter **Yes** in the **Delete** column for the item and select **Replace Event Content** in step 8.
    - To modify an item, change any column values **except** the **System Id** column and select **Replace Event Content** in step 8.
    - To add an item, add a row with the appropriate values. Leave the **System Id** column blank.
      You can delete rows for existing content and select **Add to Event Content** in step 8 or retain rows for existing content and select **Replace Event Content** in step 8.

    For additional information about creating event content in Excel files, see Creating Sourcing Event Data Using Excel [page 373].
5. Save the Excel file on your file system.
6. Click **Import Content**.

    The **Import Content from Excel** page opens.
7. Select the type of event data you want to import, such as **Contents**.
8. Select how you want to import the content (**Add to Event Content** or **Replace Event Content**).
9. Select your Excel document with the event content (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
10. Click **Import**.

    SAP Ariba checks the Excel file for errors. If the file contains errrors, you will see the message **The Excel import request failed**. Click the **Download file with error details** link. Open the file and go to the **Error** worksheet to view the errors.

    If the Excel file is valid, a **Status for pending content change** page opens that shows the status of your Excel import request and a progress bar.

    You do not have to keep this page open while your import request is being processed; you can click **Return to dashboard**. When your Excel import has been processed, you can return to the event wizard by clicking **edit event**. The **Content** page contains a **Large Contents Summary** section that lists the number of items, sections, and questions loaded.

Related Information

Creating Event Item Term Definitions in Microsoft Excel [page 395]

Creating Event Line Items in Microsoft Excel [page 394]
Creating Event Lots in Microsoft Excel [page 392]
Creating Event Requirements in Microsoft Excel [page 391]
Creating Event Questions in Microsoft Excel [page 389]
Creating Event Table Sections in Microsoft Excel [page 388]
Creating Event Sections in Microsoft Excel [page 386]

SAP Ariba Strategic Sourcing Suite Features

SAP Ariba Strategic Sourcing Suite bundles together multiple solutions and features, including bonus-penalty and lookup table formula functionality.

Bonus-Penalty

About Bonus-Penalty

Event owners can use the bonus-penalty feature with grading and scoring (Grading and Scoring) to allow designated individuals to assign bonuses or penalties to participant responses after bidding closes for an event. These bonuses and penalties impact bonus-penalty bid ranks. The event owner determines the following:

- whether bonus-penalty is enabled for an event,
- whether bonus-penalty values are entered by graders or by the event owner, and
- whether the bonus or penalty must be specified as a percentage or as an absolute monetary amount.

> ⓘ Note
>
> If you're not using grading and scoring or would prefer to specify bid adjustments when creating the event, you can use bid transformation events [page 184]. Bid transformation events enable you to define participant-specific adjustments to cost components before bidding opens for an event; adjustments can be positive (like bonuses) or negative (like penalties).

Overriding Terms After Bidding Ends

The **Allow editing after bidding is complete** item term field enables event owners, project owners, or sourcing bid term editors to enter or modify values for a term after bidding has completed. When bidding ends, event owners, project owners, or sourcing bid term editors can download all editable terms in a Microsoft Excel spreadsheet, modify the terms in Excel, and submit the new term values for the event. The sourcing bid term editor role is given to a 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.

Supplier bids are then recalculated based on the new term attributes. For more information about exporting and importing event content, see the Creating Sourcing Event Data Using Excel [page 373].

> ⓘ Note
>
> Values for the term **Quantity** cannot be edited after bidding is complete. The value for the **Allow editing after bidding is complete?** option is ignored for **Quantity**. The Excel template for importing term values has locked (protected) cells for **Quantity** values. If a user removes the lock and changes the **Quantity** value, the changed value is ignored when the Excel file is imported.

Using Negative Bonus Values to Reduce Supplier Bids

The **Choose if a bonus is represented by a negative value** event rule enables project owners to choose whether they want team graders to enter either positive or negative bonus values. By default, the rule is set to **No** and graders enter bonuses as positive values to reduce supplier bids; graders enter penalties as negative values to increase supplier bids. If the rule is set to**Yes**, graders enter bonuses as negative values to reduce supplier bids; graders enter penalties as positive values to increase supplier bids.

BonusPenalty() Function for Formulas

SAP Ariba provides the `BonusPenalty(termName)` function to apply Bonus/Penalty values to terms or expressions in formulas. For example, you have a reverse auction and:

- You define a formula **Adjusted Total Price** as `BonusPenalty('Price'*'Quantity')`.
- Bonus/Penalty is specified as a positive percentage.
- **Quantity** for an item is 3.
- Supplier A and Supplier B both bid $100 for **Price**.
- Supplier A is assigned 1% for Bonus/Penalty (a 1% bonus). The **Adjusted Total Price** is $297 ($300 less 1% = $297, 1% better) for Supplier A.
- Supplier B is assigned -10% for Bonus/Penalty (negative 10%, a 10% penalty). The **Adjusted Total Price** is $330 ($300 plus 10% = $330, 10% worse) for Supplier B.

For more information about using formulas, see Event Formulas [page 142].

SAP Ariba also provides the following global terms that use bonus-penalty values. You can add these terms to items or use them in formulas:

- **Bonus/Penalty Amount** (`Bonus/Penalty_Amount`)
- **Bonus/Penalty Percentage** (`Bonus/Penalty_Percentage`)

For example, you can define a formula **Adjusted Price** as:

```
'Bonus/Penalty_Amount'+'Price'
```

You can also set participant-specific initial values for these terms before publishing an event.

Using bonus-penalty in Follow-On Events

Bonus-penalty formulas, terms, and values are copied to follow-on events such as an auction or RFP when the same bonus-penalty formulas or terms are present in the template used to create the follow-on event.

Bonus-Penalty Workflow

Typically, graders use bonus-penalty for sourcing events, as described in one of the following scenarios:

Team Grader Assigns the bonus-penalty

1. When an event closes, the grader receives notice that the event is available for grading.
2. The grader evaluates the event.
3. The grader reviews the scorecard.
4. The grader enters a value for bonus-penalty.
5. The buyer adjusts the grades or consensus grades, as desired.
6. The buyer submits the consensus grade.

Buyer Assigns the bonus-penalty

In this scenario, the event owner does not allow team graders to enter bonus-penalty values. Only the buyer may enter a bonus-penalty value.

1. When an event closes, the grader receives notice that the event is available for grading.
2. The grader evaluates the event.
3. The buyer receives notice that the graders have submitted their grades.
4. The buyer reviews the scorecard.
5. Acting as the consensus grader, the buyer enters a value for bonus-penalty.

Buyer Adjusts the bonus-penalty

1. When an event closes, the grader receives notice that the event is available for grading.
2. The grader evaluates the event.
3. The grader reviews the scorecard.
4. The grader enters a value for bonus-penalty.
5. The buyer receives notice that the graders have submitted their grades.
6. Acting as a consensus grader, the buyer can override the consensus grade by entering a new value for the consensus grade.

Buyer Grades the Event

In this scenario, the buyer acts as the only grader of the event.

1. When an event closes, the grader receives notice that the event is available for grading.
2. The buyer evaluates the event.
3. The buyer reviews the scorecard.
4. The buyer enters a value for bonus-penalty.

Using bonus-penalty Values in Formulas

1. A buyer with the **Template Creator** group permission creates a template and enables the following event rules:
    1. Set **Can Project Owner Create Formulas** rule to **Yes**.
    2. Set **Turn On Bonus/Penalty** to **Yes**.
    3. Optionally, the buyer configures the followingbonus-penalty rules:
        - **Set Bonus/Penalty Type**
        - **Allow team grader to enter a value in Bonus/Penalty**
        - **Choose if a bonus is represented by a negative value**
2. The buyer publishes the event template.

3. A project owner creates an event using the template.
4. The project owner adds an item to the event and adds a term formula using the **BonusPenalty(termName)** function.
5. The event **Content** page displays the calculated formula bonus-penalty value along with the supplier bids.

Overriding Terms After Bidding Ends

1. A project owner or sourcing bid term editor creates an event term and chooses **Yes** for the **Allow editing after bidding is complete?** option. The project owner repeats this for all terms they want to override when bidding completes.
2. The project owner publishes the event.
3. Suppliers submit their responses.
4. When the event moves to a **Pending Selection** or **Review Responses** state, navigate to **Event Options** **Post Bid Term Override**.
5. The project owner downloads the **Import Post Bid Term Override Excel** file.
6. On the **Event Terms** tab, the project owner enters values to the terms they want to update.
7. The project owner or sourcing bid term editor uploads the **Import Post Bid Term Override Excel** file.
8. The uploaded term values display on the **Content** page.

> ⓘ Note
>
> Values for the term **Quantity** cannot be edited after bidding is complete. The value for the **Allow editing after bidding is complete?** option is ignored for **Quantity**. The Excel template for importing term values has locked (protected) cells for **Quantity** values. If a user removes the lock and changes the **Quantity** value, the changed value is ignored when the Excel file is imported.

Using Negative Bonus Values to Reduce Supplier Bids

1. A buyer with the **Template Creator** group permission, enables the following event rules:
    1. Set **Turn On Bonus/Penalty** to **Yes**.
    2. Set **Choose if a bonus is represented by a negative value** to **Yes**.
    3. Optionally, the buyer configures the followingbonus-penalty rules:
        - **Set Bonus/Penalty Type**
        - **Allow team grader to enter a value in Bonus/Penalty**
2. The buyer publishes the event template.
3. A project owner creates an event using the template.
4. After bidding ends, the buyer clicks **Adjust Grades for Consensus** in the **Actions** menu. Optionally, a team grader can click **Enter Bonus/Penalty** after entering grades for supplier responses.
5. The buyer or team grader enters a negative number in the **Bonus/Penalty** fields to add a bonus, or a positive number to add a penalty.
6. The buyer or team grader clicks **Submit**.

Using bonus-penalty Values in Follow-On Events

1. The buyer creates a new event using a template with the global term **Bonus/Penalty Percentage** or **Bonus/ Penalty Amount** in the item definition on the event **Content** page. This is an optional step that enables the buyer to see the bonus-penalty values from the predecessor event while they are creating the follow-on event.
2. The buyer copies the content from the library or past events.
3. The buyer edits the item on the event **Content** page.
4. The **List of Participants** section has a **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** column that displays the bonus-penalty values from the predecessor event.

Bonus-Penalty User Tasks

Tagging Important Suppliers

Use this procedure to tag important suppliers.

Context

The event owner can categorize some suppliers as **Important** to indicate to graders that these suppliers are the most important to grade.

Procedure

1. In an event, select the **Suppliers** tab.
2. Check the box next to the name of each supplier you want to tag as **Important.**.
3. Click the **Set/Clear** button to expand the dropdown menu.

4. Select **Important.** from the dropdown menu for the selected supplier.

Assigning a Bonus or Penalty as a Team Grader

Use this procedure to assign a bonus or penalty as a team grader.

Prerequisites

The event owner enables team graders to enter values for bonus-penalty.

Context

You can enter values for bonuses or penalties for supplier responses as part of the team grading process.

> ⓘ Note
>
> For information about the team grading process, refer to About Using Team Grading the Grading and Scoring guide.

Procedure

1. After entering grades for supplier responses, click **Enter Bonus/Penalty**.

   This opens the **Bonus/Penalty** page. Editable bonus-penalty fields are visible for each item. These fields accept values either as percentages, or as set monetary amounts, depending on the value chosen for the rule, **Set Bonus/Penalty Type** by the buyer for the event.
2. For any response from any supplier, enter a positive number to add a bonus, or a negative number to add a penalty for the response.
3. **Optional:** Click the **Add Comment** icon to add a comment or attachment for an item, and click **OK**.
4. **Optional:** To submit your bonus-penalty values, click **Submit**.
5. **Optional:** To save your bonus-penalty values, click **Save as Draft**. In the **Save Grades Confirmation** dialog, choose one of the following:
   a. **OK** to save your bonus-penalty values without applying them to the consensus grades. You can continue adding values at a later time.
   b. **Cancel** to cancel the action. Your bonus-penalty values will not be saved or submitted.
   c. **Submit** to submit your bonus-penalty values.

Assigning or Adjusting the bonus-penalty Consensus Value as the Buyer

Use this procedure to assign or adjust the bonus-penalty consensus value as the buyer.

Context

If the event owner has not disabled consensus override, the buyer can adjust the consensus bonus-penalty values entered by the team graders. Also, if the event owner has set the rule **Allow Bonus/Penalty Team Grader** to **No**, then only the buyer can provide the bonus-penalty value.

> Note
>
> For information about the team grading process, see **About Using Team Grading** in the *Grading and Scoring* guide.

Procedure

1. In an event, from the **Content** tab, click **Actions** > **Adjust Grades for Consensus**.

   If there are items to grade, this opens the **Consensus Grading** page. If there are no items to grade, this opens the **Bonus/Penalty** page.
2. **Optional:** If the **Consensus Grading** page opened, enter your grades. Then, click **Enter Bonus/Penalty**.
3. Edit the values in the bonus-penalty fields as desired. Enter a positive number to add a bonus, or a negative number to add a penalty.
4. **Optional:** To add a comment or attach a file for a question or term, click an **Add Comment** icon. Enter the comment or attach the file as desired, and click **OK**.
5. **Optional:** To submit your bonus-penalty values, click **Submit**.
6. **Optional:** To save your bonus-penalty values, click **Save as Draft**. In the **Save Grades Confirmation** dialog, choose one of the following:
   a. **OK** to save your bonus-penalty values without applying them to the consensus grades. You can continue adding values at a later time.
   b. **Cancel** to cancel the action. Your bonus-penalty values will not be saved or submitted.
   c. **Submit** to submit your bonus-penalty values.
7. **Optional:** To confirm the consensus override, click **OK**.

   The **Responses** view of the **Content** tab now shows the values for **Bonus/Penalty** and **Bonus/Penalty Adjusted**.

Downloading Comments for a bonus-penalty Event

Use this procedure to download comments for a bonus-penalty event.

Context

This feature is applicable only to those events to which team graders have been assigned.

With the grader comments download feature enabled, buyers can download all comments graders entered on bonus-penalty events into Excel files.

Procedure

1. For a bonus-penalty event with team graders and the feature grader comments download enabled, click the **Report** tab.
2. Click **Download Reports** > **Grader Comments Report**.

   This opens a dialog box.
3. In the **You have chosen to open:** pop-up, select one of the following, and click **OK**:
   - **Open with** and select an application for opening the file
   - **Save File**

Results

This downloads an Excel spreadsheet containing all grading and bonus-penalty comments made by graders for the bonus-penalty event. The **Attachments** column gives the name of any attachment a grader uploaded for an item.

Downloading Grader File Attachments for a bonus-penalty Event

Use this procedure to download grader file attachments for a bonus-penalty event.

Context

This feature is applicable only to those events to which team graders have been assigned.

With the grader attachments download feature enabled buyers can download, into organized zip files, all files graders attached to bonus-penalty events.

Procedure

1. Open an event that has team graders assigned and the bonus-penalty feature enabled.
2. Select **Actions** > **Download All Grader Attachments**.

Results

A ZIP file is downloaded containing a folder for each supplier that uploaded attachments, and within the supplier folders, separate sub-folders for bonus-penalty attachments and for grading attachments.

Sorting Supplier Bids

Use this procedure to sort supplier bids.

Context

With the supplier response sorting feature enabled, when viewing responses on the **Content** tab, buyers can sort supplier bids by any term that can be rolled up. When this feature is enabled, asterisks appear before the names of suppliers that have been designated **Important Supplier**, and they show up at the top of the table of suppliers for the event.

Procedure

1. Open an event that has bonus-penalty enabled, team graders assigned, and supplier bids entered.
2. > Note
   >
   > Note that any supplier designated **Important** has a star next to its name.

   Click the table menu icon . Then click **Participants**.
3. In the **Select Values for Participants...** pop-up, choose one of the options from the **Sort By** menu, and click **OK**.

Results

The columns in the **All Content** table have been sorted by the value chosen.

Creating bonus-penalty Follow-On Events

Use this procedure to create a bonus-penalty follow-on event.

Prerequisites

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)

Context

You can copy a bonus-penalty event to a follow-on event such as an auction or RFP so that suppliers can compete in the new event with their bonus-penalty values calculated into their bids.

Grades, comments, and attachments are copied to follow-on events.

Grades and bonus-penalty values remain in the follow-on event after the event is reopened and suppliers revise their bids.

Depending on the settings selected, suppliers can see their own bids and those of competing suppliers transformed by the bonus-penalty values assigned to each supplier.

Procedure

1. Create a sourcing project with **Event Type** set to **Auction** or an RFx event type. Set the **Predecessor Project** to an RFx document that has the bonus-penalty feature enabled and the **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** global term on the item. If you are creating an auction, select a template designed for a reverse auction or for a reverse auction with bid transformation.

> ⓘ Note
>
> Adding the **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** global term on the item allows you to review the bonus-penalty values in the follow-on event before the event starts.

2. On the **Content** page of the sourcing project, click **Add** > **Content From Library**.
3. Select **Copy participant responses as initial values**.

> ⓘ Note
>
> If the **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** global term was not used on the item, the bonus-penalty values appear in the follow-on event when the suppliers bid. Selecting **Submit participant responses as initial bids** meets this condition.

4. Select the items desired, and click **Copy**.
5. Open a line item.

   In the **List of Invited Participants**, you can see the values for each participant copied from the bonus-penalty RFx document in the **Bonus/Penalty Percentage** column. The values are applied to the bids.
6. In the list of **Item Terms**, click **Bonus/Penalty Percentage**, and click **Edit**.

   You can also see the bonus-penalty values copied from the predecessor event here, in the **List of Invited Participants** under the **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** column.
7. Edit the term as desired.

> ⓘ Note
>
> You can edit the bonus-penalty values only if the rule in the bonus-penalty RFx document is set to allow editing of the bonus-penalty values.
>
> The **Bonus/Penalty Percentage** or **Bonus/Penalty Amount** global term values are editable but will not change when saved.
>
> Bonus-penalty formula terms copied over from predecessor events can be edited and saved.

Creating Reports for bonus-penalty Events

Use this procedure to create reports for bonus-penalty events.

Context

Buyers can send the rule **Turn on Bonus/Penalty** to the event-level summary for reporting purposes.

Procedure

1. From the **Sourcing** section, under **Common Actions**, select **Analytical Report**.
2. For **Main Fact**, choose **Event Item Summary**.
3. On the **Source Data** tab, under **Available Measures**, right-click one or more measures , such as **Submitted Bids** and click **Add to Report**.
4. On the **Pivot Layout** tab, select **Available Fields**, and click **Allow Bonus/Penalty**, and select the type of field desired.
5. On the **Refine Data** tab, for **Allow Bonus/Penalty:**, select **Select Others**, and then check the box for **Yes**, and click **OK**.
6. Click **Run Report**.
7. Click **Data** > **Detail View**.
8. On the **Page** tab of the **Field Browser**, click **Allow Bonus/Penalty**, and click **Yes**.
9. From the list of events, click the name of the bonus-penalty event you created. Then, click **View More Details**.

Information for bonus-penalty Administrators

Configuring bonus-penalty

Use this procedure to configure bonus-penalty.

Prerequisites

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

Enable bonus-penalty at the template level, when creating a project. Refer to Initiating Team Grading in the Grading and Scoring guide.

Procedure

1. Before publishing the template, scroll to the **Bidding Rules** section.
2. To enable bonus-penalty set **Turn On Bonus/Penalty** to **Yes**.
3. > ⓘ Note
   >
   > The competitive term usually is the extended price, but alternatively, it can be set to other terms. For bonus-penalty, however, the competitive term must have the type **money**.

   Select one of the following values for **Set Bonus/Penalty Type**:

   - **Percentage** to make the bonus or penalty a percentage of the competitive term.
   - **Amount** to make the bonus or penalty a set monetary amount to be added to or subtracted from the competitive term.
4. **Optional:** To allow a team grader to enter amounts for bonuses and penalties, set **Allow Team Grader to Enter a Value in Bonus/Penalty** to **Yes**.
5. By default, **Choose if a Bonus is represented by a negative value** is set to **No** and bonus is a positive value. If you want bonus to be a negative value, set this rule to **Yes**.

Bonus-Penalty Custom Worksheet

About bonus-penalty Custom Worksheet

With the bonus-penalty custom worksheet feature, buyers can define custom worksheets that team graders can use to calculate and upload bonus-penalty values to events.

Enabling These Features

To enable the bonus-penalty custom worksheet feature for a given event, customize a template, enable the bonus-penalty rule and the team grader rule in the custom template, and create an event based on the custom template.

1. Under **Common Actions**, click **Templates**.
2. Under **Sourcing Events**, click the name of a template such as **Request for Proposal**, and click **Copy**. Enter a title for the custom template, and click **OK**.
3. On the **Documents** tab of the**Templates** page, click the name of the new custom template, and click **Open**.
4. Under **Documents**, click the name of your event, and click **Edit**.

5. On the **Rules** tab, for **Enable preview period before bidding opens**, select **No**.
6. For **Response start date:**, select **When I click the Publish button on the Summary page**
7. For **Turn on Bonus/Penalty**, select **Yes**, and select **Delegated**.
8. For **Allow team grader to enter a value in Bonus/Penalty**, select **Yes**, and **Delegated**.
9. On the **Definitions** sub-tab of the **Content** tab, click **Bonus/Penalty Excel Import**.
10. On the **Import Bonus/Penalty Excel File** page, click **Download Content**.
11. With the **Offline Content** worksheet open, add the bonus-penalty formulas desired, and save the file.

> Note
>
> If someone already has added bonus-penalty formulas to the Excel file attached, the Excel file will not contain an **Offline Content** worksheet, and the **Content** worksheet already will contain values.

12. On the **Import Bonus Penalty Excel Spreadsheet** page, click **Browse**, browse to the worksheet, and select it.
13. Click **Import** > **Done**.
14. Click **Exit** > **Return to project**.
15. Publish the template.

Workflow for bonus-penalty Custom Worksheet

1. The buyer downloads an Excel file to use as a template for a customized bonus-penalty worksheet.
2. The buyer creates a custom worksheet for each item by adding columns for suppliers and rows containing inputs and formulas for calculating thebonus-penalty.

> Note
>
> To calculate the bonus-penalty differently for different items, the buyer creates a separate custom worksheet for each item.

3. By adding formulas to the custom **Content** worksheet the buyer maps a designated cell to the **Bonus/Penalty** field. The **Bonus/Penalty** field then shows the correctbonus-penalty for a given item for a given supplier.
4. Prior to publishing the event, the buyer uploads a custom worksheet into the event.
5. Graders download custom worksheets from the event, add their bonus-penalty values into the custom worksheets, and upload them back into the solution.
6. After the upload, the buyers review the values in the solution bonus-penalty fields that graders submitted via uploaded custom worksheets.

> Note
>
> During this phase, graders cannot edit the bonus-penalty values via the user interface. To change a value, the buyer would have to upload a different version of a custom worksheet. However, during the consensus grading phase, buyers can override grader bonus-penalty values via the user interface.

7. After reviewing the bonus-penalty values, a grader can submit the values to the event.

Bonus-Penalty Custom Worksheet User Tasks

Creating Custom Bonus-Penalty Worksheets

Use this procedure to create a custom bonus-penalty worksheet.

Procedure

1. Create an event based on a custom template containing bonus-penalty worksheets.
2. Add team graders to the event.
3. On the **Suppliers** tab, add suppliers and an initial bid to the event as desired.
4. **Optional:** Designate suppliers as **Important** as desired.
5. On the **Content** tab, delete any sections in the template, add line items as desired.
6. Click the **Bonus/Penalty Excel Import** button.

   This opens the **Import Bonus/Penalty Excel file** page.
7. Click the **Download Original Offline Bonus/Penalty Sheet** button, and select either **Open with: Microsoft Excel**, or **Save File** as desired, and click **OK**.

   This downloads an Excel file containing several worksheets generated from the Excel file on the custom template. Worksheets labeled **Instructions** and **Content** are always included. Additionally, worksheets labeled **Bonus-Penalty Values** and **BP Comments** are provided if the buyer administrator provided bonus-penalty values or comments. If the buyer administrator did not provide bonus-penalty values or comments, a worksheet labeled **Offline Content** is included.
8. > Note
   >
   > You can use the values and formulas provided on the **Bonus/Penalty Values** worksheet in the values and formulas you enter on the **Content** worksheet.

   On the **Content** worksheet in the Excel file, provide the desired formulas in the **Bonus/Penalty** column for each supplier, and save the Excel file.
9. On the **Import Bonus/Penalty Excel file** page, click **choose file**, browse to the Excel file you just edited, and select it.
10. On the **Import Bonus/Penalty Excel file** page, click **Import**.
11. Click **Done**.
12. Publish the event.
13. To monitor the event, click **Monitor**.

Adding bonus-penalty Values by Custom Worksheet

Use this procedure to add bonus-penalty values by custom worksheet.

Procedure

1. For an event, select **Actions** > **Grade as Team Member**.

   This opens the **Enter Bonus/Penalty** page.
2. Select **Offline Bonus/Penalty using Excel**.
3. Do one of the following:
   - To continue grading in the Excel file that already contains bonus-penalty values added by graders, click **Download Content**.
   - To start grading using the Excel file originally provided by the event owner, click **Download Original Bonus/Penalty file**.

   This downloads an Excel file containing several worksheets generated from the Excel file on the custom template. Worksheets labeled **Instructions** and **Content** are always included. Additionally, worksheets labeled **Bonus-Penalty Values** and **BP Comments** are provided if the buyer administrator provided bonus-penalty values or comments. If the buyer administrator did not provide bonus-penalty values or comments, a worksheet labeled **Offline Content** is included.
4. Enter your bonus-penalty values or formulas into the **Content** worksheet, and save the Excel file to your computer.

   > Note
   >
   > It is possible to use the values and formulas provided on the **Bonus/Penalty Values** worksheet in the values and formulas you enter on the **Content** worksheet.
5. Click **Choose file**, browse to the custom bonus-penalty Excel file, select it, and click **Import**.
6. **Optional:** To see the values you just imported, select **View Imported Bonus/Penalty values**

   If the event has three suppliers or fewer, the values for the suppliers are displayed. If the event has more than three suppliers, a pop-up first asks you to select the three participants for which you want to see the values. In the latter case, select the suppliers desired, and click **OK**.
7. **Optional:** To see all the suppliers and line items in a single table, on the **Enter Bonus/Penalty** page, click **Bonus/Penalty Excel Review**. When finished viewing, click **Done**.
8. Click **Submit**.
9. To view or adjust the bonus-penalty values for consensus grading, click the **Content** tab. Then, from the **Actions** menu, click **Adjust Grades for Consensus**. On the **Enter Consensus Bonus/Penalty** page, enter any adjustments desired, and click **Submit**.

   The values in the **All Content** table on the **Content** tab now reflect the bonus-penalty values submitted by custom Excel files, with the ranks of the suppliers displayed in parentheses on the **Bonus/Penalty Adjusted** row for each supplier.

Dynamic Lookup Tables and Lookup Formulas

About Dynamic Lookup Tables and Lookup Formulas

Support for dynamic lookup tables enables buyers to use lookup tables in guided sourcing events and provides dynamic lookup based on lookup table versions and one-to-many mapping between an input column and terms.

SAP Ariba Strategic Sourcing Suite enables buyers to upload tables of data into their SAP Ariba site to enable calculation of complicated elements, like taxes or freight, based on data entered by both buyers and suppliers. For example, an item may have a **Ship To** term defined by the buyer and the **Ship From** data and the size of the goods being sourced is entered by suppliers. Using these three terms, buyers want to calculate the shipping cost. A lookup table enables buyers to return relevant values based on the specified combinations.

Buyers have the ability to create a formula that returns a value from lookup tables based upon the inputs of the buyer and supplier using terms or formulas in the item.

In the formula, buyers enter the workbook tab name and the item terms that are to be used for looking up the table data and the return value column.

A lookup table is a workbook with set of input columns and output columns. Workbooks can have multiple worksheets with different combinations of data. A sample table is given below.

Table 1: Sample Lookup Table

Input	Input	Input	Output	Output
ShipTo	**ShipFrom**	**Size**	**Shipping_Cost**	**Shipping_Time**
Nashville	Chicago	Small	50	2
Nashville	Phoenix	Small	40	4
Nashville	Phoenix	Medium	77	4

Input	Input	Input	Output	Output
Omaha	Phoenix	Large	80	5

The input columns, **ShipTo**, **ShipFrom**, and **Size**, are names of the terms in a sourcing event. Buyers create formulas in line items to derive output value from the input values of terms added by both the buyer or suppliers. Formulas can specify the worksheet name to be used and list valid terms to use in the formula. For example, if a line item has the following **ShipTo**, **ShipFrom**, and **Size** terms: the buyer enters Nashville for the **ShipTo** value, the supplier enters Chicago for the **ShipFrom** value, and the **Size** value is small then the value for **Shipping** cost is **50**.

The document type, **Lookup Table**, enables buyers to load lookup table workbooks. Buyers can upload lookup tables to a central location from the **Administration** > **Product Sourcing Manager** > **Lookup Table** page. Buyers can also search for and download lookup tables from this page.

Support for dynamic lookup tables enables buyers to upload multiple versions of a lookup table to the central location and to create one-to-many mappings between an input column and terms. SAP Ariba maintains versions of the lookup table to ensure that the correct version, based on the creation date of the sourcing event, is referenced when using lookups in sourcing events. Additional options are provided in the template configuration to create lookup table mappings.

Buyers can upload multiple lookup tables in the same Excel file. Each worksheet in the Excel workbook represents a separate lookup table that is identified by the name of the worksheet that contains the table.

On the **Lookup table** page, separate entries are created for the lookup tables that are uploaded using the same Excel file. The file name, lookup table name which is derived from the worksheet name, and the created date are displayed on the page. For versioning, the file names are appended with a version number and version entries are created for the lookup tables. The version column indicates the lookup table version.

Buyers using guided sourcing can create dynamic lookup table mappings for RFP events created from sourcing requests. Buyers can now choose a value for an input field from the drop-down list of choices and the value for the output field is then set dynamically based on the lookup table.

Buyers must ensure that the lookup table Excel files that they upload meet the validation criteria as explained in Lookup Table Excel File Validation Criteria [page 535].

Buyers can also use a REST API, dynamic lookup table API, to upload lookup table Excel files to their SAP Ariba sourcing site. For more information, see Dynamic Lookup Table API.

Prerequisites

- To be able to use the dynamic lookup tables, you must enable the ICM parameter **Application.ACM.EnableDynamicLookUpTable**.

  > ⓘ Note
  >
  > When you enable the ICM parameter **Application.ACM.EnableDynamicLookUpTable**, the previously-enabled lookup table feature is disabled and all references to the lookup tables are lost.

  For more information, see Enable support for dynamic lookup table.
- To access **Administration** > **Product Sourcing Manager** > **Lookup Table**, you must be a member of the **Materials Administrator** group.

Restrictions

- Dynamic lookup tables are not supported in contract workspaces.

Lookup Table Excel File Validation Criteria

When you create an Excel file to upload lookup tables, ensure that the file meets the following criteria.

- The Excel file contains one or more sheets that represent lookup tables.
- Every sheet has at least one input column and an output column.
- The first row is used to identify the columns as input columns or output columns.
- The second row is used to specify column names. Column names should be unique and should not be left blank.
- The total number of input and output columns in a lookup table does not exceed 250.
- The total number of rows in a lookup table does not exceed 20000.
- The total number of unique entries in an input column should not exceed 1500.
- The total number of sheets in the Excel file does not exceed 25.
- The names of worksheets and columns should not contain space between words.

Uploading a Lookup Table

Use this procedure to upload lookup tables in Excel format from the **Administration** > **Product Sourcing Manager** > **Lookup Table** page.

Prerequisites

- Enable the ICM parameter **Application.ACM.EnableDynamicLookUpTable**.
- To access **Administration** > **Product Sourcing Manager** > **Lookup Table**, you must be a member of the **Materials Administrator** group.

Context

After you create an Excel file that contains the lookup table and meets the conditions as explained in Lookup Table Excel File Validation Criteria [page 535], follow these steps to upload the file.

Procedure

1. Click **Administration** > **Product Sourcing Manager** > **Lookup Table**.

   The **Lookup table** page appears.
2. Click **Browse** to select the lookup table data file.
3. Click **Upload** to upload the selected lookup table data file.

   The uploaded file is validated for conditions mentioned in Lookup Table Excel File Validation Criteria [page 535]. If there are errors, the errors are displayed on the page. Fix the errors, and repeat the steps.

   The lookup tables in the Excel file you uploaded are listed on the page with the status as **Created**. If a lookup table by the same name already exists, a new version of the lookup table is created. The file names are also updated by appending the version number.

   After the next run of the scheduled task, the status of the lookup table changes to**Success**. When the scheduled task is running, the status is shown as **Processing**. If the scheduled task encounters any errors while importing the file, the status appears as **Failure**.
4. Click **Done** to exit the page.

Searching for a Lookup Table

Use this procedure to search for lookup tables and lookup table data files from the **Administration** > **Product Sourcing Manager** > **Lookup Table** page.

Prerequisites

- Enable the ICM parameter **Application.ACM.EnableDynamicLookUpTable**.
- To access **Administration** > **Product Sourcing Manager** > **Lookup Table**, you must be a member of the **Materials Administrator** group.

Context

You can search for lookup tables or lookup table data files based on a number of criteria such as , **File name**, **Lookup table name**, **From date**, **To date**, and **Status**.

Procedure

1. From the **Administration** > **Product Sourcing Manager** page, click **Lookup Table**.

   The **Lookup table** page appears.

2. Specify one or more of the following criteria and click the *filter* icon.
   - **File name**: name of the lookup table data file that you want to search for.
   - **Lookup table name**: name of the lookup table that you want to search for.
   - **From date**: created date from which you want to search for the lookup table.
   - **To date**: created date until which you want to search for the lookup table.
   - **Status**: status of the lookup table that you want to search for. Supported values are **Created**, **Success**, **Processing**, and **Failure**.

   The page displays the list of lookup tables or lookup table data files that meet the specified filtering criteria.

Editing a Sourcing Template to Create Lookup Table Mappings

Use this procedure to create lookup table mappings from the event template. You cannot create lookup table mappings for terms from the event page.

Prerequisites

Ensure that the ICM parameter **Application.ACM.EnableDynamicLookUpTable** is enabled.

You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.

Context

To edit a template, the template status must be **Draft**. If you have published a template, you must create a new, draft version of the template to edit. When you are done editing a template, you must publish the template to make the changes affect subsequent projects created using the template.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. Locate the template that you want to edit. Click the template name and select **Open**.
3. Navigate to the **Overview** tab of the template.
4. In the **Properties** pane, select **Actions** > **Template** > **New Version**.
   You can modify and add items to the template.
5. From **Contents**, locate the term for which you want to create the mapping and click **Edit**.

> ⓘ Note
>
> You can select only terms that have the answer type set to **Text (single line limited)**.

6. For **Add term to lookup table mapping**, click **Yes**.

   The **Lookup table name** and **Lookup table field ID** fields appear.
7. From the **Lookup table name** dropdown, select the lookup table that contains the fields that you want to map.

   The **Lookup table field ID** dropdown lists the column names in the lookup table you specified.
8. Select the **Lookup table field ID** with which you want to map the selected term.

   > ⓘ Note
   >
   > You can map the same field with multiple terms.
9. Click **Done**.

Creating Lookup Formula Terms for Cost Breakdown

Use this procedure to create sourcing templates that use lookup terms in cost group terms.

Prerequisites

- The sourcing template to which you want to add the lookup terms as cost group terms must have the **Allow cost groups to capture detailed Cost Breakdowns** rule set to yes.
- You must be a member of the **Template Creator** group.

Context

When you add a cost group term in a sourcing template, you can map the cost elements of a costgroup to a lookup table available for the site.

Procedure

1. When you create a new sourcing template or edit an existing template, go to the **Content** tab and click **Add** to add a new term or select an existing term and click **Edit**.
2. Click the **Open cost breakdown for this line item** icon () to open the cost group to which you want to add the cost element or that contains the cost element that you want to edit.
3. When you add or edit a new term, configure the following parameters.

- Set **Answer Type** to **Text (single line limited)**.
- Set **Add term to lookup table mapping** to **Yes**.
- From the **Lookup table** dropdown, choose the lookup table to which you want to map the term.
- From the **Lookup table field ID** dropdown, select the lookup table column to which you want to map the term.
- From the **Acceptable Values** dropdown, select either **List of Choices** or **Any**.
  If you select **List of Choices**, corresponding values from the lookup table are populated as a dropdown list in the sourcing event. If you select **Any**, a text field is provided for the users to enter values that match entries in the lookup table.

  > Note
  >
  > Selecting List of Choices does not add the dropdown values directly to the template as the values are dynamically added to the sourcing event

4. Complete the rest of the configuration for the term, and click **OK**.

Creating Lookup Table Mappings from the Event Page

Use this procedure to create lookup table mappings from the event page for sourcing requests.

Prerequisites

- Ensure that the self-service parameter **Application.ACM.EnableDynamicLookUpTable** is enabled.
- You must be a member of the global **Template Creator** group or the template project's **Templates Creator** team to create or edit templates.
- Ensure that the lookup table Excel files that you wish to upload meet the validation criteria as explained in Lookup Table Excel File Validation Criteria [page 535].

Procedure

1. Upload the lookup table. See Uploading a Lookup Table [page 535].
2. While creating the SAP Ariba **Sourcing Request Template** template, configure the following parameters only for the terms added from the lookup table:
   a. Set **Answer Type** to **Text (single line limited)**.
   b. Set **Add term to lookup table mapping** to **Yes**.
   c. From the **Lookup table** dropdown, choose the lookup table to which you want to map the term.
   d. From the **Lookup table field ID** dropdown, select the lookup table column to which you want to map the term.
   e. From the **Acceptable Values** dropdown, select **List of Choices**.

If you select **List of Choices**, the corresponding values from the lookup table are populated as a dropdown list in the sourcing event.

> ⓘ Note
>
> Ensure that the same **Unique Name** that is auto-generated per input term, is used while creating the sourcing request, to map the lookup table column to the respective input term. You can select the unique name from the dropdown of unique names already available while creating new input terms.

3. To create a sourcing request, click **Create** > **Sourcing Request**. Enter all the relevant details, ensure that the **Dynamic LookUp Table Sourcing Request** template is selected, and click **Create**.
4. Once the sourcing request is approved, create an RFP sourcing project using the **Sample Lookup Template** template.

   From **Contents**, you can view the input terms added from the lookup table. The output value is calculated and displayed as per the lookup formula.

Results

You can select a combination of input values from the dropdown and get to know the output.

Creating Lookup Formulas for Cost Group Terms

Use this procedure to create lookup formulas for cost group terms in a sourcing template.

Prerequisites

- You must be a member of the **Template Creator** group.
- The sourcing template to which you want to add the lookup terms as cost group terms must have the **Allow cost groups to capture detailed Cost Breakdowns** rule set to yes.

Context

In sourcing templates, you can add lookup formula terms for cost breakdown.

Procedure

1. When you create a new sourcing template or edit an existing template, go to the **Content** tab and click **Add** to add a new formula term or select an existing term and click **Edit**.

2. Click the **Open cost breakdown for this line item** icon (![icon]) to open the cost group to which you want to add the cost element lookup formula or that contains the cost element that you want to edit.
3. Enter a **Name** for the lookup formula.
4. Select the **Lookup Formula** check box.

   Lookup terms available for the site and the **Lookup Table** dropdown list that displays the lookup tables available for the site appear.
5. From the **Lookup Table** dropdown, choose the lookup table from which you want to select the terms for the formula.

   The list of terms is refreshed to show the lookup terms from the selected lookup table. The **Lookup table output** dropdown appears.
6. Click **Insert** corresponding to the lookup terms that you want to include in the lookup formula.

   > ⓘ Note
   >
   > Add comma between the lookup terms.
7. From the **Lookup table output** dropdown, select the output column in the lookup table.
8. Click **Add** to save the formula.

Synchronizing Dynamic Lookup Table Values with the Mapped Terms in Sourcing Events

Use this procedure to synchronize dynamic lookup table values with the mapped item terms in sourcing events.

Prerequisites

- Your administrator must enable the **Synchronize dynamic lookup table values with the mapped terms** (`Application.ACM.SyncLatestValueOfDynamicLookupTableFieldWithMappedTerm`) ICM paramter. For more information about the parameter, refer to Synchronize dynamic lookup table values with the mapped terms.
- Your administrator must upload a dynamic lookup table to your site. For more information, refer to Uploading a Lookup Table [page 535].

Context

In sourcing events having item terms mapped to a dynamic lookup table, the term values are automatically synchronized and lookup formulas are recalculated when a new version of the dynamic lookup table is uploaded to your site. Buyers can view the updated term values in the **Content** tab of the event at any point until the event is published.

Procedure

1. Create a sourcing template with lookup table mappings.

   For more information, refer to Editing a Sourcing Template to Create Lookup Table Mappings [page 537].

   While mapping a term with the lookup table, remember to select **List of Choices** from the **Acceptable Values** dropdown.
2. Add a lookup formula term in the template.

   For more information, refer to Creating Lookup Formulas for Item Terms in Sourcing Events [page 542].
3. Create a sourcing event using the template created in the previous step.

   In the **Content** tab, you can view the lookup terms mapped with the lookup table. The output value is calculated according to the lookup formula.
4. Change the values in the dynamic lookup table and upload a new version to your site. For more information, refer to Uploading a Lookup Table [page 535].

   Ensure that the lookup table is uploaded successfully.
5. Open the sourcing event created as part of Step 3 [page 542], and go to the **Content** tab.

   Verify that the terms are updated and in sync with the corresponding mappings in the latest version of the dynamic lookup table.
6. Publish the event.

Creating Lookup Formulas for Item Terms in Sourcing Events

Use this procedure to create lookup formulas for item terms in a sourcing template.

Prerequisites

- You must be a member of the **Template Creator** group.
- If you want to add lookup formula to a cost group term, then the rule **Allow cost groups to capture detailed Cost Breakdowns** must be enabled in the corresponding sourcing template.

Context

Lookup formulas help in calculating the output value for the input values that buyers select for item terms mapped to a dynamic lookup table. You can add a lookup formula to an item term, including a cost group term, in a sourcing template.

Procedure

1. Create a sourcing template or open an existing template.

   To create a sourcing template, refer to Creating New Project Templates.

   To edit a sourcing template, refer to Editing a Project Template.
2. Go to the **Content** tab of the template.
3. Add a term or edit an existing term in the template/
4. Select **Add** > **Formula** to add a formula.

   Lookup formula for a cost group term can be added from the cost breakdown page of the line item.
5. Enter a **Name** for the lookup formula.
6. Select the **Lookup Formula** check box.

   Lookup terms available for the site and the **Lookup Table** dropdown list that displays the lookup tables available for the site appear.
7. From the **Lookup Table** dropdown, choose the lookup table from which you want to select the terms for the formula.

   The list of terms is refreshed to show the lookup terms from the selected lookup table. The **Lookup table output** dropdown appears.
8. Click **Insert** corresponding to the lookup terms that you want to include in the lookup formula.

   > Note
   >
   > Add comma between the lookup terms.
9. From the **Lookup table output** dropdown, select the output column in the lookup table.
10. Click **Add** to save the formula.

ERP Integration for Creation of Displays Using Lots

When your SAP Ariba Strategic Sourcing Suite is integrated with an external ERP through the SAP Integration Suite, managed gateway for spend management and SAP Business Network, it is possible to perform the following actions:

- You can create display sets in your SAP Ariba solution and send them to your ERP system where they are added to your article master data.

  > Note
  >
  > The articles that you use to make up a display set in your SAP Ariba solution must exist already in article master data in both your SAP Ariba solution and in your ERP system.
- In order to create an outline agreement for an article, the article must be associated with a plant in your ERP. In some instances articles may not be associated with plants. You can copy articles to a sourcing event multiple times adding a different plant for each copy of the article and send the article copies to your ERP system where they will exist as the same article but with different plants (also known as sites).

Prerequisites

The following actions must be taken before you can use this feature:

- The `Application.AQS.ArticleIntegration.ArticleDataCreation.Enabled` site configuration option must be enabled (Site configuration options are set by SAP Ariba. For more information, see Site Configuration Options for Managing Events [page 561]).
- Feature "Create Article Master Data from event and parameter" must be enabled for your site.
- 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.

Related Information

Adding a Display Set from SAP Ariba Sourcing to an External ERP [page 544]
Extending an Article for Multiple Plants and Sending the Article Extensions to an ERP [page 546]

Adding a Display Set from SAP Ariba Sourcing to an External ERP

Use this procedure to add a display set from SAP Ariba Sourcing to an external ERP.

Context

When articles from article master are imported from your ERP system to your SAP Ariba Strategic Sourcing Suite solution, you can create display sets consisting of the imported articles in your SAP Ariba Strategic Sourcing Suite solution and send the display sets back to your ERP system, where they become part of your ERPs article master data. These display sets can then be used as articles in your purchasing processes.

> ⓘ Note
>
> The articles that you use to make up a display set in your SAP Ariba Strategic Sourcing Suite solution must exist already in article master data in both your SAP Ariba Strategic Sourcing Suite solution and in your ERP system.

Procedure

1. Sign in to your SAP Ariba solution.

2. Select ▸ **Create** ▸ **Sourcing Project** ▸.
3. Enter the required details for the project, select the appropriate template, and click **Create**.
4. On the **Content** tab, select ▸ **Add** ▸ **Content From Article Master Data** ▸.
5. Search for an article that was added from an external ERP. Aside from the article itself you can also view and select any variants of the article that were added.
6. Select article variants and click **Copy** to copy the articles to the Sourcing event.

   In the Sourcing event line items you can see the material group and characteristic details for each article you copied.
7. Click **Publish** on the event Summary page to publish the event.
8. Select the **Content** tab.
9. Select ▸ **Add** ▸ **Lot** ▸ and add the relevant lot details, including Name and Category (which is the material group for the article).
10. Select **Done**.
11. Click on the lot item and select ▸ **Add** ▸ **Line Item** ▸.
12. Select the articles you want to add to the lot and click **OK**.
13. Select **Next**, then select **Update** on the **Summary** tab of the sourcing event, then select **Update Event**.
14. On the Event Published page, select the **Monitor** this event link.
15. Select the **Scenario** tab at the top of the page.
16. Select ▸ **Create** ▸ **Manual Scenario** ▸.

    A manual scenario can be created in any event that has either Open or Pending status.
17. Click on the **Master Data Creation** button.
    The articles in the event are displayed.
18. Select the check box for the lot article and click **Send Articles**.
    This sends the lot article to be created in the ERP. The status is updated to SENT in your SAP Ariba solution.
19. Save the untitled scenario and exit the event.

Results

The status of the lot item is updated to CREATED when receipt of the item has been acknowledged by the ERP and the corresponding display set has been created in article master data there.

Extending an Article for Multiple Plants and Sending the Article Extensions to an ERP

Use this procedure to extend an article for multiple plants and send the article extensions to an ERP.

Context

In order to create an outline agreement for an article, the article must be associated with a plant in your ERP. In some instances articles may not be associated with plants. When articles from article master are imported from your ERP system to your SAP Ariba Strategic Sourcing Suite solution, you can copy any of those articles to a sourcing event multiple times adding a different plant for each copy of the article, and the article copies can then be pushed back to the ERP system where they will exist as the same article but with different plants. Plants are known as sites in S4HANA.

Procedure

1. Sign in to your SAP Ariba solution.
2. Select **Create** > **Sourcing Project**.
3. Enter the required details for the project, select the appropriate template, and click **Create**.
4. On the **Content** tab, select **Add** > **Content From Article Master Data**.
5. Search for an article that was added from an external ERP.
6. Select an article or article variant and click **Copy** to copy the article to the Sourcing event.
7. On the event **Content** tab, select the **Plant** field for one article.
8. Search for and add a plant.
9. Repeat steps 7 and 8 for the other article copies in the event, selecting a different plant for each article.
10. Click **Publish** and then, on the Event Published page, select the **Monitor** this event link.
11. Select the **Scenario** tab at the top of the page.
12. Select **Create** > **Manual Scenario**.
    A manual scenario can be created in any event that has either Open or Pending status.
13. Click on the **Master Data Creation** button.
    The articles in the event are displayed.
14. Select the check boxes for the articles for which you added plants and click **Send Articles**.
    This sends the selected articles to the ERP where they will exist as the same article but with different plant/site values. The status is updated to SENT in your SAP Ariba solution.

Contract Terms in Category Attribute Hierarchy

If your site has the SAP Ariba Strategic Sourcing Suite, users can create a contract terms library by associating sourcing event questions and contract terms with categories in a category attribute hierarchy and uploading the hierarchy file to SAP Ariba. When these questions and terms are tagged as contract terms in the category attribute hierarchy XML, they can be used in the following ways:

- When a category is added to a sourcing event, event questions that are associated with that category are added to the event. When a contract workspace is created from the event, the questions that are tagged as contract terms, along with any supplier answers, are copied to the contract workspace as contract terms, where they can be edited by the contract workspace owner.
  Note that this is only supported for the initial creation of a contract workspace from a sourcing event, not for the update of an existing contract workspace from a sourcing event award. This only applies to questions that are also visible to the supplier in the sourcing event.
- When a category is added to a contract workspace template or contract workspace, questions configured as contract terms that are associated with that category are added to the workspace. These questions and terms can be edited by users.
  For standalone procurement contract workspaces, if the category is selected when creating a contract workspace, the contract terms for that category are displayed on the Create contract workspace page under the heading **Contract Terms**. When a contract workspace is created from a sourcing event, the category (or categories) is copied from the sourcing event and the associated contract terms are displayed on the Create contract workspace page under the heading **Contract Terms**.

  > Note
  >
  > If there are supplier-facing questions tagged as contract terms in the preceding sourcing event, those questions and the supplier responses are copied over to the contract workspace as contract terms. If there are no such questions in the sourcing event, then, based on the contract workspace's category, the associated contract terms are added.

  When creating standalone contract workspaces, only the associated category for that question is used for evaluation of whether or not the contract term should be added. Other rule conditions are ignored in this scenario.

  The **Actions** > **Edit Contract Terms** function is available for the **Contract Terms** pane. You can select this option to edit the contract terms for the current contract workspace. This takes you to a new page where you can edit the contract terms.
  Aside from editing terms when first creating a contract workspace, after publication of a contract workspace contract terms can only be edited when the contact workspace amendment type is Renewal or Amendment.
- Contract terms can be used as conditions in a contract workspace template or a stand-alone contract workspace. These conditions can be applied to document clauses or tasks in a contract workspace. For more information about using conditions in a contract workspace template or contract workspace, see Project Template Guide.
  It is not possible to edit existing conditions using contract terms or to import/export conditions that contain contract terms.
- Contract terms can be added as document properties to contract master agreements and contract addendum documents. For information about using contract terms as document properties in Microsoft Word documents, see Contract authoring guide.

To use contract terms with a category attribute hierarchy, the site configuration parameter Contract terms [page 570] (`Application.AQS.ContractTerms.Enabled`) must be set to **Yes** (the default value).

For information about setting up questions as contract terms in a category attribute hierarchy, see Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.

> ⓘ Note
>
> Questions that are added to a sourcing event that are not tagged as contract terms already can also be added to a contract workspace as contract terms on an ad hoc basis. For more information, see Adding Sourcing Event Questions to a Contract Workspace [page 548].

Related Information

Contract Terms Support in Category Attribute Hierarchy
Contract terms [page 570]

Adding Sourcing Event Questions to a Contract Workspace

Use this procedure to add sourcing event questions to a contract workspace. Questions that are added to a sourcing event that are not tagged as contract terms already can be added to a contract workspace as contract terms on an ad hoc basis.

Context

> ⓘ Note
>
> Category attribute hierarchy must be enabled in your site.

Procedure

1. Create a contract workspace from a sourcing event that has been awarded.
2. Select **Actions** > **Add Questions** in the **Sourcing Event Questions** area.
3. Select the question(s) that you want to add to the contract workspace and click **OK**.
   The questions that you added are listed in the **Sourcing Event Questions** area. SAP Ariba maintains the order of sourcing event questions when you add them to contract workspaces.

Editing Supplier Responses to Questions That Were Added to a Contract Workspace from a Sourcing Event

Use this procedure to edit supplier responses to questions that were added to a contract workspace from a sourcing event.

Procedure

1. Select **Actions** > **Edit Responses** in **Sourcing Event Questions** area on the contract workspace.
2. Edit the supplier response.
3. Click on **Done**.

Searching for Contract Workspaces Using the Contract Terms Filter

Use this procedure to filter a contract workspace search based on contract terms by creating expressions consisting of contract term names and contract term values, and filtering on those expressions.

Context

For example, say you have contract terms called "Has insurance?" and "Insured amount", and you want to search for contract workspaces that have values of "Yes" for Has insurance? And ">= 1000" for Insured amount. You can set up a contract terms search filter to return only contract workspaces that contain contract terms and that match these criteria.

You can enter any number of expressions. If multiple expressions are added, they are combined using AND. Therefore if you add two expressions, a contract term must satisfy both expressions to be returned in your filter results.

You can combine header fields in the existing filter context with contract term expressions to filter contract workspaces. All filter fields are applied using the AND operator. So all selected header fields and contract term expressions must be satisfied to match your filter. For example, if you select Region = "Germany", Has insurance = "Yes", and Insured amount >= "1000", then only contract workspaces that satisfy all of these conditions are returned in your contract workspace search.

> **Note**
>
> Category attribute hierarchy must be enabled in your site.

Procedure

1. Select the **Contracts** tab on your **Home** dashboard.
2. Select **Contract Workspace (Procurement)** from the search pull-down menu and click on the search icon.
3. Click on **select** beside the **Contract Terms** field.

   If the Contract Terms field is not visible, click on the **+** icon beside the search field and select **Contract Terms** from the pull-down menu.
4. On the **External System** pull-down menu, select the source external system for the contract terms you want to search.
5. Enter the name of the contract term you want to filter by in the text box.
6. Select an operator for the filter expression.

   For example, if you have a contract term called "Insured amount", and you want to filter contract workspaces that have this contract term and for which the contract term value is ">= 1000", you would select the ">=" operator.

   If a contract term has a simple Yes/No response, the operator pull-down menu is not displayed. In that case a Yes/No pull-down menu is displayed and you can select form that.
7. Enter an operand value beside the operator.

   For example, in the example above, you would enter "1000".
8. Click on the plus icon to add this expression.

   You can enter any number of expressions. If multiple expressions are added, they are combined using AND. Therefore if you add two expressions, a contract term must satisfy both expressions to be returned in your search results.

   You can select the edit icon in an expression to edit the operand values for the expression.
9. Select **OK**.
   The expression is added in the Contract Terms field on the search page. If you only add one expression and you fail to click on **OK**, the expression is still added in the Contract Terms field.
10. Select **Search**.
    Only contract workspaces that contain contract terms and contract term values that match your search expression are returned.

Search for Contract Workspaces That Were Last Published on a Specified Date

You can filter a contract workspace search based on the date on which the contract workspace was last published.

You can view and search for contract workspaces based on different attributes of a contract workspace. Specifially, you can search for contract workspaces that were last published on a specified date. The last published date is available in the field, **Last Published Date**, on the **Workspace Overview**, **View Details**, and **View Overview** pages.

Viewing Change History for Sourcing Event Questions and Contract Terms on Contract Workspaces

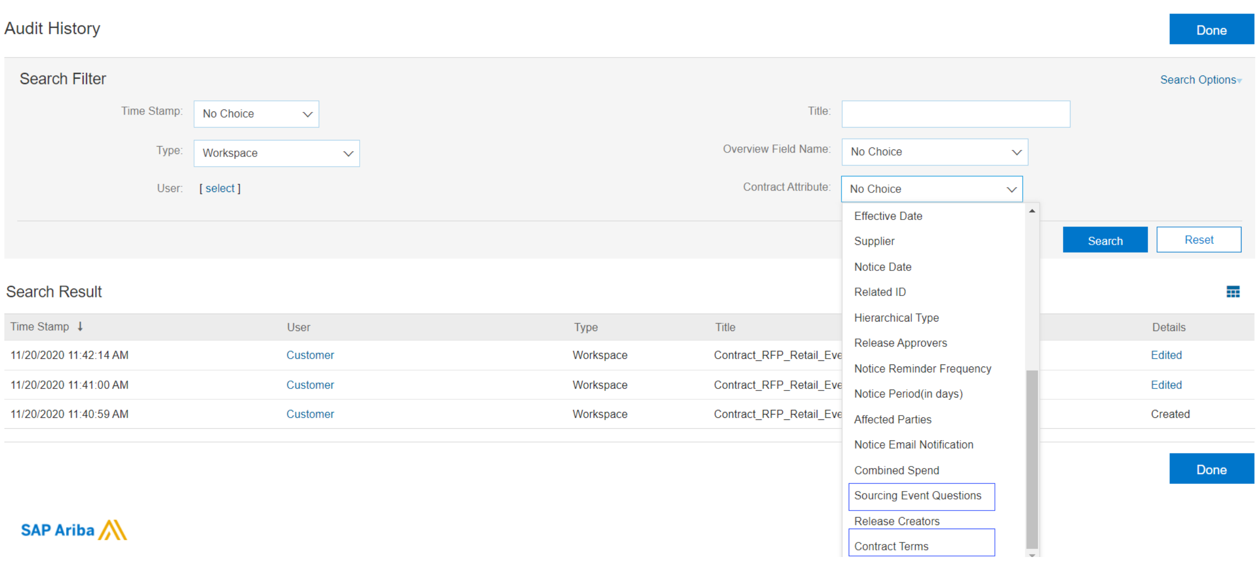
You can see changes that were made to sourcing event questions or contract terms on a contract workspace on the **Audit History** page for that workspace.

> ⓘ Note
>
> Category attribute hierarchy must be enabled in your site.

It is important for contract managers to be able to see any modifications that were made to sourcing event questions and contract terms in contract workspaces, and these changes can be tracked on the **Audit History** page for a workspace. This allows contract managers to see which users modified certain attributes on a given date so that they can easily reach out to colleagues if they want to ask about changes.

If sourcing event questions or contract terms are added, updated, or removed in the **Sourcing Event Questions** or **Contract Terms** areas of a contract workspace overview page, these changes are now logged on the **Audit History** page of the contract workspace, which is reached by selecting **Actions** > **View History** in the Overview area of the workspace.

To filter sourcing event question or contract term changes, select **Workspace** from the **Type** pull-down menu, and then select one of the following options from the **Contract Attribute** menu: **Sourcing Event Questions** or **Contract Terms**.



You can click on the **Edited** link in the **Details** column to see details about the change.

Adding an Item from Article Master to a Sourcing Event

Use this procedure to add items from article master to a sourcing event if article master data was integrated or uploaded for your site.

Prerequisites

- Category attribute hierarchy must be enabled for your site.
- **Enable enhanced UI for article master item search** (`Application.ACM.EnhancedArticleMasterSearch.Enabled`) must be set to **Yes**.
  Your administrator can set this parameter in Ariba Administrator under **Intelligent Configuration Manager** > **Manage Configurations**.
- Article master data must be integrated with your site.

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. Click on the **Content** tab on the **Event** page.
2. Select **Add** > **Content From Article Master Data**.
3. Type in the search field to search by article ID or article name.
4. If an external system has not been set for the event already, select the external system from which the article was integrated or imported.
5. Type in a filter field to search for a filter option or select the menu icon to show all filter options for the item.
6. When you have made your filter selections, click on the **Apply** button to apply your filter.
7. Select the items that you want to add to the sourcing event.

Search results are paginated at ten per page, and you can select items across multiple pages to add to an event in a single action.

For article types that are comprised of multiple items, such as the Sales Set, Display, and Prepack article types, you can click on the link in the **Type** column of the search results to show the items that comprise that article.

If there are multiple plants available for an item, when you click on the plant selection link in the **Plant** column, all plants are selected by default and they are sorted in alphabetical order. If you select multiple plants for an item, when you add that item to an event, articles are listed in the event based on the alphabetical order of the plant IDs.

8. Select **Copy** to add the selected items to the event.

Related Information

Article Master

Adding a Product Questionnaire to a Line Item Within a Sourcing Event

Use this procedure to add a product questionnaire to a line item within a sourcing event. Product questionnaires contain groups of questions. You can add a product questionnaire to a line item on an ad hoc basis.

Prerequisites

The following must be enabled for your site:

- SAP Ariba Strategic Sourcing Suite
- Category attribute hierarchy

Context

You can add multiple questionnaires to a line item, provided each questionnaire is associated with a term that has the Product Questionnaire answer type. So, for example, you might have a Certification Questionnaire and an Insurance Questionnaire associated with a single line item.

The line item does not have to be based on data from a category attribute hierarchy.

For more information about product questionnaires, see Common Data Import and Administration Guide for SAP Ariba Strategic Sourcing Solutions and SAP Ariba Supplier Management Solutions.

> **Note**
> Category attribute hierarchy must be enabled in your site for this feature.

Procedure

1. Add a line item to the sourcing event.
2. Select **Add** > **Term** under **Item Terms**.
3. Select **Product Questionnaire** for the Answer Type and click **OK**.
   Product Questionnaire is listed as an item term.
4. Select the **Select Product Questionnaire** link beside the **Product Questionnaire** term.
5. Search for and select the product questionnaire that you want to add to the line item.
   You can click on this link to open the questionnaire, and you can add initial values for questions.
6. Click **OK**.

Results

A link to the selected questionnaire is listed beside **Product Questionnaire** under **Item Terms**. You can click on this link to open the questionnaire, and you can add initial values for questions.

Adding Product Questionnaires to Configurable Bid Comparison Reports

Use this procedure to add product questionnaires to configurable bid comparison reports. Product questionnaires, including supplier answers to questions, can be added at item level in the configurable bid comparison report.

Prerequisites

The following must be enabled for your site:

- SAP Ariba Strategic Sourcing Suite
- Category attribute hierarchy

Procedure

1. On the **Report** tab in the event, click on the **Download Reports** button, and choose **Bid Comparison Report**.
2. Click on the **Report Configuration** tab and select **Additional configuration**.
3. Select the **Include product questionnaires** checkbox.

Results

A **Product Questionnaire** sheet is added to the report. The Product Questionnaire sheet lists all items in a sourcing event that contain product questionnaires in the order in which those items appear on the sourcing event. The product questionnaires associated with each item are listed under the item, along with the questions in each product questionnaire. In the example below, Custom Term 1 is the term name (of type Product Questionnaire) and not the name of the product questionnaire itself.

	A	B	D	F	H	J	L
1	Number	Name	Initial Values	Supplier Company 1	Supplier Company 2	Supplier Company 3	Supplier Company 3
2							
3	1	Line Item - L1					
4		Custom Term 1					
5		Attachment Query 2	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx
6		Date Query 1	10/29/2020 6:30 PM	10/29/2020	10/27/2020	10/28/2020	10/29/2020
7		Attachment Query 1	file-sample_1MB.docx	doc_ref_784.xls	sample_ref_23456.docx	refDoc2.xls	doc_ref_99912.xls
8							
9							
10							

Bid Comparison | **Product Questionnaire**

If the buyer added initial values for questions, these are listed in the Initial Values column of the report. Separate columns are included for answers provided by each supplier.

When **Different initial and submitted values** is selected under **Highlight** on the Report Configuration page, if a value provided by a supplier is different from the buyer's initial value this is highlighted on the Product Questionnaire sheet.

When **Missing response** is selected under **Highlight** on the Report Configuration page, if the supplier fails to provided a response to a question, this is highlighted.

Related Information

Creating Configurable Bid Comparison Reports [page 461]

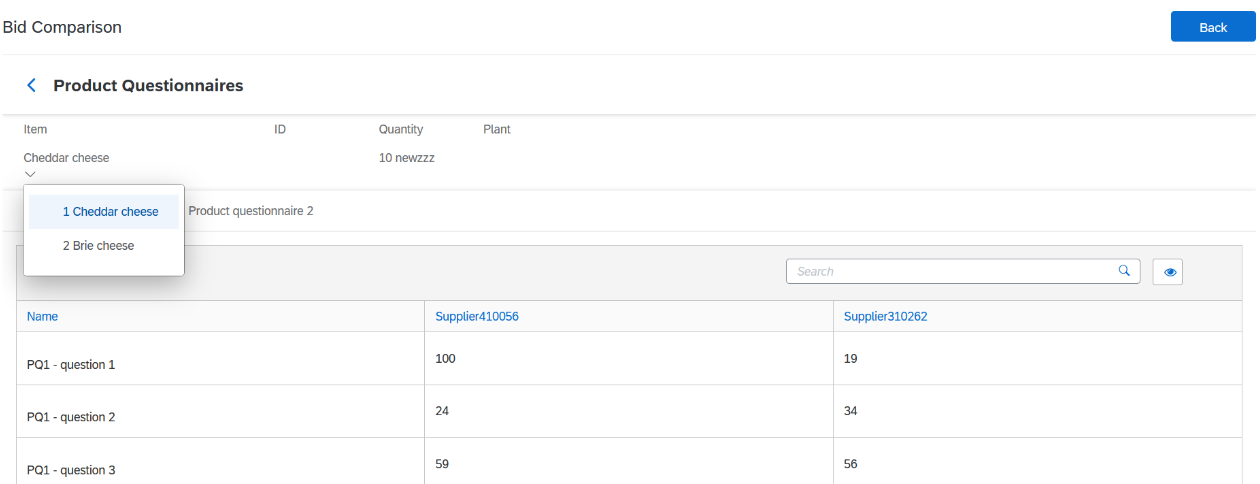
Viewing Product Questionnaire Responses

You can open any one product questionnaire on the event Content page and view responses to all product questionnaires (assigned to line items) in the event from a single page.

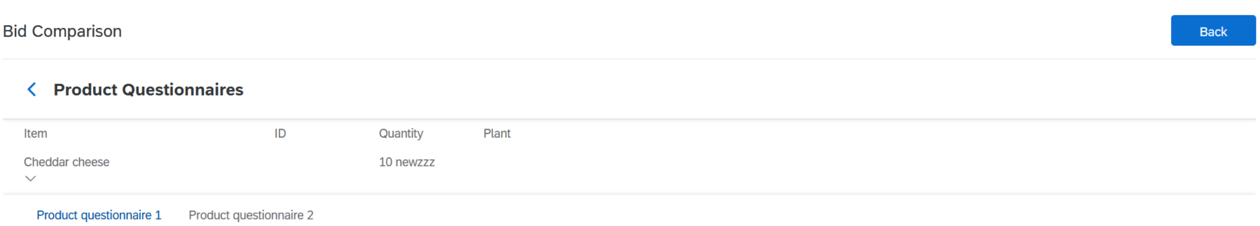
> ⓘ Note
>
> Category attribute hierarchy and SAP Ariba Strategic Sourcing Suite must be enabled in your site for this feature.

When you click on a product questionnaire, the Product Questionnaires page opens displaying the questions in that questionnaire by default.

Some details for the line item with which the product questionnaire is associated are included at the top of the page. The name of the line item is listed under the **Item** heading. You can click on the line item name to display a list of all line items and lots in the event that contain product questionnaires. If you select another item from the list, the product questionnaires associated with that item are displayed on the page and details for that line item replace those that were displayed for the previous item.



All product questionnaires associated with a selected line item are displayed as tab items on the page.



For example, in the image above, "Product questionnaire 1" and "Product questionnaire 2" are tabs that contain the product questionnaires associated with the "Cheddar cheese" item.

You can type in the **Search** field to filter questions in a product questionnaire.

You can click on the eye icon to the right of the search text field to filter suppliers whose responses you want to show for a product questionnaire.

Ability to Block Classic Sourcing Creation

Customers who use the classic SAP Ariba Sourcing interface are able to block users from creating sourcing projects and sourcing requests through the classic sourcing user interface and allow users to use the guided sourcing interface.

To enable this ability, customers must submit a request to SAP Ariba Support to enable the parameter **Block classic sourcing creation** (`Application.AQS.RFX.BlockClassicSourcingCreation`).

After this parameter is enabled, the **Sourcing Project** and **Sourcing Request** options are hidden from the **Create** and **Common Actions** menus on the SAP Ariba Sourcing dashboard to make sure that only guided sourcing projects or requests are created. If a user creates a subproject or follow-on project from other workspaces or from an external system, the user is redirected to the guided sourcing interface for project creation.

> ⓘ Note
>
> Customers have the advanced option **Create My Test Project** in a sourcing template to create test projects from a template. For guided sourcing templates, the **Create My Test Project** option always opens the guided sourcing interface. For classic sourcing templates, if the parameter **Block classic sourcing creation** (`Application.AQS.RFX.BlockClassicSourcingCreation`) is set to **Yes**, the **Create My Test Project** option opens the guided sourcing interface for full test projects and the classic sourcing interface for quick test projects. If this parameter is set to **No**, the **Create My Test Project** option in classic sourcing templates always opens the classic sourcing interface.

Ability to Open Classic Sourcing Projects and Sourcing Requests in Guided Sourcing

Customers can open full sourcing projects and sourcing requests that are created through the classic sourcing user interface in guided sourcing.

To enable this ability, the ICM parameter **Open classic sourcing projects and sourcing requests in guided sourcing** (`Application.AQS.RFX.NavigateToNewUIExtension`) must be set to **Yes**.

After this parameter is set to **Yes**, classic full sourcing projects and sourcing requests are all opened through the guided sourcing interface by default, whereas quick sourcing projects are still opened through the classic SAP Ariba Sourcing interface.

> ⓘ Note
>
> This parameter requires customers to enable guided sourcing and be a member of the **Category Buyer** group.

Ability to Switch to Guided Sourcing Through Sliders, Options, and Popup Messages

Customers can switch from the classic SAP Ariba Sourcing interface to the guided sourcing interface through the **Guided Sourcing View** slider in the upper right corner of full sourcing projects or sourcing requests, through the **Guided Sourcing View** option in the **Actions** > **Display** menu in the **Overview** panel of a classic full sourcing project or request, or through a popup message displayed on the classic sourcing project or sourcing request creation page.

To enable this ability, the ICM parameter **Show options to switch to guided sourcing** (`Application.AQS.RFX.ShowOptionsToSwitchToGuidedSourcing`) must be set to **Yes**.

> Note
>
> This parameter doesn't require customers to enable guided sourcing or be a member of the **Category Buyer** group
>
> Users who navigated from the classic view to the guided sourcing view can switch back to the classic view by selecting **Switch to classic view** from the **More actions** icon (•••) in the upper-right corner of the project page.

Notifications for Sourcing Requests and Projects Created from an ERP Integration

SAP Ariba Sourcing sends email notifications to all active team members of sourcing requests and projects created using the RFQ and Award Integration with SAP Ariba Sourcing feature when certain events occur.

The email notifications specific to sourcing requests and sourcing projects created from sourcing requests use event notification template variables as described in Event Notification Template Variables [page 302]. Sourcing request originators receive email notifications when sourcing requests are successfully created and if the sourcing request creation process fails. There are two email notification templates used to generate emails sent to sourcing request originators:

- **ERPSourcingRequest** - This template is used to generate email notifications sent to sourcing request originators after sourcing requests are created. The **ERPSourcingRequest** template contains information about the sourcing request and a direct link to access it in SAP Ariba.

  > Note
  >
  > The originator's email address must be included in the cXML sourcing request. The originator must also have an SAP Ariba account with credentials to access the sourcing request. SAP Ariba does not validate if the originator's email address is associated with an existing SAP Ariba user account.

- **ERPSourcingRequest_Failure** - This template is used to generate email notifications sent to sourcing request originators after the sourcing requests creation process fails.

SAP Ariba Sourcing sends email notifications for sourcing requests and sourcing projects created from sourcing requests when:

- SAP Ariba Sourcing receives a cXML document from the ERP requesting a sourcing request (a new `QuoteRequest` message) and a sourcing request is created inSAP Ariba Sourcing. By default, SAP Ariba Sourcing sends the following notification to members of the Sourcing Manager system group:

  ```
  [Workspace.InternalId] [Workspace.Title]: Send Notifications for New Sourcing
  Requests
  Title: Send Notifications for New Sourcing Requests
  Description: Notify sourcing managers when a new Sourcing Request is created
  from the data received from the external integrated system.
  This email originated from the
                          SAP Ariba system used by Buyer Organization and was
  originally sent to: user@email
  System Reference: Click Here to access the system.
  ```

- SAP Ariba Sourcing receives a cXML document to update a sourcing request and the sourcing request has not been approved. SAP Ariba Sourcing updates the sourcing request (including any line item changes) and sends the following notification to active team members of the sourcing request:

  ```
  Sourcing request [Workspace.InternalId] [Workspace.Title] was updated by the
  originating system.
  ```

- SAP Ariba Sourcing receives a cXML document to delete a sourcing request and the sourcing request has not been approved or it has been approved but the sourcing event has not been created. SAP Ariba Sourcing cancels the sourcing request and sends the following notification to active team members of the sourcing request:

```
Request to cancel the Sourcing Request [Workspace.InternalId] [Workspace.Title]
was received from the external
integrated system. The Sourcing Request was cancelled.
```

- A sourcing request is approved. SAP Ariba Sourcing sends the following notification to the approval task owner using the project email template for approved tasks (the template **Task - Sent to the approval task owner when the task is fully approved**). The default subject line for this template is:

```
[Workspace.InternalId] [Workspace.Title]: [Task.Title] was fully approved.
```

  For information about customizing project email templates, see Project Administration Guide.
- A cXML update request is received after the event is created. SAP Ariba Sourcing sends the following notification to active team members of the event:

```
A request to update event [EVENT_TITLE] was received from the originating system.
Click Here to review the changes.
```

  If the event is any non-final state (any state other than closed, awarded or canceled), SAP Ariba Sourcing creates a new, draft version of the event with the changes and clicking the link in the notification opens the new version of the event. If the event has been awarded or closed, SAP Ariba Sourcing rejects the update request and clicking the link in the notification opens the last published version of the event.
- A cXML cancel (delete) request is received and the event is any non-final state (any state other than closed, awarded or canceled). SAP Ariba Sourcing sends the following notification to active team members of the event:

```
A request to cancel the Sourcing Project [Workspace.InternalId]
[Workspace.Title] was received from
the external integrated system.
Please cancel the Sourcing Project [Workspace.InternalId] [Workspace.Title].
```

- A cXML cancel (delete) request is received after an event is awarded, closed or canceled. SAP Ariba Sourcing rejects the cancellation request because the event is in the Completed state and sends the following notification to active team members of the event:

```
A request to cancel the Sourcing Project [Workspace.InternalId]
[Workspace.Title] was received from
the external integrated system but was ignored because the Sourcing Project
[Workspace.InternalId] [Workspace.Title] was already Closed.
```

Site Configuration Options for Managing Events

Some of the functionality for events is controlled by site configuration options, which SAP Ariba sets for you.

Maximum width for Name column in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthName`)

Sets the maximum width of the **Name** column (name of item or lot) in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthDescription` (set by SAP Ariba Support)

Sets the maximum width of the **Description** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthAnswer` (set by SAP Ariba Support)

Sets the maximum width of the **Anser** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

Row height in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelRowHeight`)

Sets the default height of rows in a supplier bid spreadsheet. The default value is -1, which means that rows expand automatically to show all the contents for a single entry. For readability, you can limit the maximum row height by setting this to a positive number. A positive number specifies the maximum height (number of single lines in a cell) for the row height, based on the height of a single line of data. For example, if you set this to 3, the maximum row height is 3 times the height of a single line.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Maximum width for Name column in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthName`)

Sets the maximum width of the **Name** column (name of item or lot) in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthDescription` (set by SAP Ariba Support)

Sets the maximum width of the **Description** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

`Application.AQS.ArticleIntegration.SupplierBiddingExcelMaxColumnWidthAnswer` (set by SAP Ariba Support)

Sets the maximum width of the **Anser** column in supplier bid spreadsheets. Supplier bid spreadsheets are protected Excel documents, so suppliers cannot modify the column width. Specify the maximum column width in typographic points (a point is 1/72 of an inch or 0.353 millimeters).

Row height in supplier bid spreadsheets (`Application.AQS.ArticleIntegration.SupplierBiddingExcelRowHeight`)

Sets the default height of rows in a supplier bid spreadsheet. The default value is -1, which means that rows expand automatically to show all the contents for a single entry. For readability, you can limit the maximum row height by setting this to a positive number. A positive number specifies the maximum height (number of single lines in a cell) for the row height, based on the height of a single line of data. For example, if you set this to 3, the maximum row height is 3 times the height of a single line.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

`Application.AQS.RFX.AllowToOptimizeDefaultScenarios` (set by SAP Ariba Support)

Specifies if preconfigured optimization scenarios are automatically evaluated (optimized) when an event moves to the **Pending Selection** state.

`Application.AQS.RFX.AllowToOptimizeDuringBidding` (set by SAP Ariba Support)

Specifies if real-time optimizations are enabled. If real-time optimizations are enabled, optimization scenarios can be evaluated and shown during bidding (when the event is in the open state). Scenarios are shown under the event **Contents** tab and the **Scenario** tab is absent. Setting this parameter to **Yes** also causes SAP Ariba to automatically evaluate (optimize) preconfigured optimization scenarios when an event moves to the **Pending Selection** state (it is a superset of the functionality provided by the `Application.AQS.RFX.AllowToOptimizeDefaultScenarios` parameter).

By default, SAP Ariba uses multithreading [page 576] when evaluating bid ranks for real-time optimization.

`Application.AQS.AutoEventCompletionWhenAllItemsAwarded` (set by SAP Ariba Support)

Specifies if an event automatically changes to the **Completed** state after at least one award is submitted for each item in the event. The default value is `Yes`; if set to `No`, events must be manually closed.

`Application.AQS.RFX.EnableCustomTemplates` (set by SAP Ariba Support)

Specifies if the factory-provided RFX templates can be modified or copied. The default value is `No`.

`System.AQS.RFX.LargeContents.MaxSampleItemCount` (set by SAP Ariba Support)

Specifies the maximum number of items that can be added as sample data using the field-based user interface for large-capacity events. The default value is `50`.

`Application.AQS.RFX.Services.MaxHierarchyDepth` (set by SAP Ariba Support)

Specifies the maximum number of service outline levels allowed in a service hierarchy.

Default: 5.

`Application.Integration.EnableSendDraftQuotesToERP` (set by SAP Ariba Support)

Specifies if draft event awards can be sent to external ERP systems. The default value is `No`.

`Application.AQS.RFX.BlockClassicSourcingCreation` (set by SAP Ariba Support)

Specifies whether the classic SAP Ariba Sourcing user interface is blocked for creating sourcing projects and requests.

If set to **Yes**, the classic SAP Ariba Sourcing user interface is blocked, and the new guided sourcing user interface is used. This means that the **Sourcing Project** and **Sourcing Request** options are hidden from the **Create** and **Common Actions** menus on the SAP Ariba Sourcingdashboard to make sure that only guided sourcing projects or requests are created; If a user creates a subproject or follow-on project from other workspaces or from an external system, the user is redirected to the guided sourcing interface for project creation.

If set to **No**, the classic SAP Ariba Sourcing interface is not blocked. The **Sourcing Project** and **Sourcing Request** options are available in the **Create** and **Common Actions** menus on the SAP Ariba Sourcing dashboard, which allow users to create a classic sourcing project or request. If a user creates a subproject or follow-on project from an existing classic sourcing project or from an external system, the classic SAP Ariba Sourcing interface is used.

> ⓘ Note
>
> - For new customers who deploy SAP Ariba Sourcing after the feature SS-37006 is released (February 2023), this parameter is set to **Yes** by default during site deployment.
> - Classic quick test projects are not controlled by this parameter and are always created through the classic SAP Ariba Sourcing interface.

`Application.AQS.ERPIntegration.PRDocumentTypeValidCombos` (set by SAP Ariba Support)

Specifies the PRDocumentType and Document Category combinations that will be filtered on the **Scenario** page.

The parameter takes a comma-separated list of values. Each value specifies a valid combination of PR Document Type, Document Type, and Document Category in a colon-separated format: *`PRDocType`*:*`DocType`*:*`DocCategory`*.

The default is an empty list, meaning the system displays Document Type and Document Category using a list from enumeration files without any filtering.

`Application.AQS.ERPIntegration.AwardValidityDatesEnablementCombos` (set by SAP Ariba Support)

Controls the visibility of **Validity Start Date** and **Validity End Date** fields on the **Scenario** page.

The parameter takes a comma-separated list of values. Each value specifies a valid combination of Document Type and Document Category in a colon-separated format: *`DocType`*:*`DocCategory`*.

The default is an empty list, meaning the **Validity Start Date** and **Validity End Date** fields are not enabled on the **Scenario** page.

`Application.AQS.ERPIntegration.ItemToProjectAggregation.CommodityLevel` (set by SAP Ariba Support)

Specifies the commodity code level used to aggregate from line-level **Commodity** values to the project **Commodity** field in sourcing requests.

If the commodity for a line item is at a lower level (higher level number) than this value, the commodity is mapped to its ancestor at this level in the commodity code hierarchy and the ancestor is added to the project **Commodity** field.

If the commodity for a line item is at the same level or higher (lower level number) than this value or if this value is negative, the line item's commodity is added to the project **Commodity** field (the commodity is not mapped to an ancestor).

The default value is `2`. Note that the highest level of the commodity code hierarchy is level 0 (All).

This parameter is ignored if `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` is false (line-level commodity values are not aggregated to the project **Commodity** field).

`Application.AQS.ERPIntegration.ItemToProjectAggregation.RegionLevel` (set by SAP Ariba Support)

Specifies the region level used to aggregate from line-level **Regions** values to the project **Regions** field in sourcing requests.

If the region for a line item is at a lower level (higher level number) than this value, the region is mapped to its ancestor at this level in the region hierarchy and the ancestor is added to the project **Regions** field.

If the region for a line item is at the same level or higher (lower level number) than this value or if this value is negative, the line item's region is added to the project **Regions** field (the region is not mapped to an ancestor).

The default value is `2`. Note that the highest level of the region hierarchy is level 0 (All).

This parameter is ignored if `Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` is false (line-level region values are not aggregated to the project **Regions** field).

`Application.AQS.ERPIntegration.ItemToProjectAggregation.Enable` (set by SAP Ariba Support)

Specifies if line-level **Commodity** and **Regions** values are aggregated to the project header fields in sourcing requests. If true, the

`Application.AQS.ERPIntegration.ItemToProjectAggregation.CommodityLevel` and `Application.AQS.ERPIntegration.ItemToProjectAggregation.RegionLevel` parameters specify the hierarchy levels to which the values are aggregated.

The default is `false`.

`Application.AQS.ArticleIntegration.Enabled` (set by SAP Ariba Support)

When this parameter is set to Yes, a new field, Include Category Questions in this Section, is added to the create section page when creating a section on the Contents tab of a RFX document on a sourcing project template.

`Application.AQS.ArticleIntegration.MixedCases.Enabled` (set by SAP Ariba Support)

When this parameter is set to Yes, when an administrator creates any sourcing event template that contains a lot of type “Basket – Bid at Lot Level (collect item pricing post bidding)”, a **Link Items** field is displayed. When Yes is selected for this field sourcing event line items can be copied to a lot from outside the lot. The default value for this parameter is No.

`Application.AQS.RFX.CopyContentLibraryAttributePermissions` (set by SAP Ariba Support)

If a user has deleted terms from a content document in the SAP Ariba Sourcing content library, the term’s properties can be inherited from the event template when you copy that document into your event. This parameter controls this behavior. If the parameter is set to **Yes**, the default, when you copy content library documents into an event, SAP Ariba Sourcing copies the term properties from the content library.

If the parameter is set to **No**, and if the event contains no line items when you copy an item from the content library to an event, then SAP Ariba Sourcing uses the term properties from the event template. If the event does contain line items when you copy an item from the content library to an event, then SAP Ariba Sourcing uses the term properties from the event. In either case, if the parameter is set to **No**, the term properties from the content library are ignored.

`Application.SM.MinimumRegistrationStatusForEventAccess` (self-service)

Specifies the minimum registration status a supplier must have in order to participate in sourcing events. Suppliers who are below the minimum status can be invited to events, but cannot access them until they have achieved the minimum status. The restriction applies to suppliers who have been qualified for the event commodities, regions, and departments using qualification data import but who have not yet achieved the required registration status.

This parameter is only applicable in SAP Ariba Supplier Lifecycle and Performance and SAP Ariba Supplier Information and Performance Management (new architecture) solutions, which include supplier registration projects. The default value is 3. The valid values are:

- 0 or **Not Invited**: suppliers who have not yet been invited to register can participate in sourcing events. No registration invitations are issued.
- 1 or **Invited**: suppliers must have already been invited to register to participate in sourcing events. Suppliers who have **Not Invited** status when they are invited to events are automatically invited to register as well, and their registration status changes to **Invited**. However, they do not need to submit the registration questionnaire to participate in events.
- 2 or **Pending Approval**: suppliers whose registration is pending approval or who are already registered can participate in sourcing events. Suppliers who have **Not Invited** status when they are invited to events are automatically invited to register as well, and their registration status changes to **Invited**. They must submit the registration

questionnaire the participate in events, but their registration does not need to be approved.
- 3 or **Registered**: only suppliers with approved registrations can participate in sourcing events. Suppliers who have **Not Invited** status when they are invited to events are automatically invited to register as well, and their registration status changes to **Invited**. They must submit the registration questionnaire and their registrations must be approved before they can participate in events.

Note that event templates have a supplier eligibility rule based on registration status. That rule governs whether or not suppliers can be invited to an event. This parameter governs their ability to participate after invitation.

Any change to this parameter's setting applies only to participants invited to events after it is made.

> ⓘ Note
>
> If your site includes SAP Ariba Supplier Lifecycle and Performance and you use process projects for supplier qualification, refer to About Supplier Qualification and SAP Ariba Sourcing Events.

Self-Service Site Configuration Parameters for Events

Allow messages to be sent to specific participants, rather than all participants

Controls whether team members can send messages to specific participants, or only to all participants. When this parameter is set to **Yes**, team members can send messages to all participants or to specific participants. When this parameter is set to **No**, team members have only one option: to send messages to all participants.

ID	`Application.AQS.EnablePrivateMessaging`
Name	**Allow messages to be sent to specific participants, rather than all participants**
Default value	**No**

The event message board rule **Choose the default recipients for emails sent to team members** lets you choose the default recipients for email sent to participants. It determines the default behavior of the **To** field of emails composed on the event message board. By default, these emails are sent to all participants, but you can also allow messages to be sent to specific participants only, or you can disable sending email to all participants.

This rule appears only when the `Application.AQS.EnablePrivateMessaging` parameter is set to **Yes**.

The options available for the rule are the following:

Option	When team members compose new messages on the event message board, default is to send messages to...
All	All participants
Selected	Selected participants
None	No preselected participants. Team members must select recipients in the **To** field before they can send a message.
Disable All	This option disables sending messages to all participants.

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

Allow users to submit Approval for award tasks from task page

Determines if users can manually submit **Approval for award** tasks from the task page.

ID	`Application.AQS.RFX.CanSubmitAwardApprovalFromTaskPage`
Name	**Allow users to submit Approval for award tasks from task page**
Default value	**No**

If a user submits a scenario for an award from the event scenario page and there is an **Approval for award** task for the event, the task is automatically submitted for the user.

If this parameter is set to **Yes**, users can manually submit **Approval for award** tasks from the task page if needed.

If this parameter is set to **No**, and the **Approval for award** task must be manually submitted, the user must return to the scenario page to submit the task.

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

Bypass approvals for edits to published events

Bypasses (suppresses) **Approval For Publish** tasks if a user attempts to publish changes to a sourcing event and the event was previously published.

ID	`Application.AQS.RFX.SuppressRuntimeEditApprovals`
Name	**Bypass approvals for edits to published events**
Default value	**No**

An event can have an **Approval For Publish** task, which requires the event to be approved before it is published. If the **Approval For Publish** task is configured with the **Repeat For Each Document Draft** option enabled, changes to a published event can trigger a new **Approval For Publish** task.

If this parameter is set to **Yes**, a user who edits a published event that has an **Approval For Publish** task with the **Repeat For Each Document Draft** option enabled can publish the edited event directly without submitting the edited event for approval.

If this parameter is set to **No**, a user who edits a published event that has an **Approval For Publish** task with the **Repeat For Each Document Draft** option enabled must submit the edited event for approval and an **Approval For Publish** task is created.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager Administration
Requiring Approvals for Event Contents or Award Scenarios (Approval For Publish and Approval For Award Tasks) [page 503]
Parameter Management in Intelligent Configuration Manager

Contract terms

Specifies if contract terms are supported.

ID	`Application.AQS.ContractTerms.Enabled`
Name	**Contract terms**
Default value	**Yes**

This feature is used with a category attribute hierarchy. When set to **Yes**, category attribute hierarchy questions can be automatically added as contract terms to stand-alone contract workspaces and to contract workspaces created from sourcing events.

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
Managing Contract Spending from Contract Workspaces
Contract Terms in Category Attribute Hierarchy [page 547]
Contract Terms Support in Category Attribute Hierarchy

Copy bid currency types for conversion when copying events

Copy the bid currency type when copying participant responses to another event even if the source event is a full project or if the source event is not specified as the Predecessor Project. Set this parameter to **Yes** to convert copied bid values if the event currency type is different than the bid currency type.

ID	`Application.AQS.RFX.AlwaysCopyBidCurrency`
Name	**Copy bid currency types for conversion when copying events**
Default value	**No**

Specifies if the bid currency type is always copied when an event is copied and the **Copy participant responses** as initial values option is selected.

By default, this parameter is **No** and the bid currency type is not copied if the event is copied from a full project (not a quick project or event) or if the event is copied from a project that is not configured as the **Predecessor Project** for the new event. To ensure that bid currency types are always copied when the **Copy participant responses** as initial values option is selected, 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

Copy default term values from template definitions

Specifies if the default value of a term defined in a template is copied to projects.

ID	`Application.AQS.EnableTermDefaultValueCopy`
Name	**Copy default term values from template definitions**
Default value	**No**

Specifies if the default value of a term defined in a template is copied to projects.

If this parameter is **No**, the term value in the template is not copied to instances of the term in projects created from the template.

If this parameter is **Yes** and the term definition in the project template has a default value, the value is copied to instances of the term in projects created from the template.

Note that if this parameter is **Yes** and content is copied from a sourcing request, contract, or content document, the term value from the template is copied only if the term value is not set (is unspecified) in the source content.

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
About the Definitions Tab (Item Definitions in Templates) [page 490]

Copy Term Permissions When Copying Items from Content Library

Specifies how the **Team Access Control** values (permissions) for terms are handled when copying items from a content library document to an event.

ID	`Application.AQS.RFX.CopyContentLibraryAttributePermissions`
Name	**Copy Term Permissions When Copying Items from Content Library**
Default value	**Yes**

If this parameter is **Yes** and items are copied from the content library to a project, the **Team Access Control** values for terms in the content library document items are copied to the event.

If this parameter is **No**, the **Team Access Control** values for terms that already exist in the project are used; if the terms do not exist in the project but are defined in the template used to create the event, the values from the template are used.

Note that the value of **Team Access Control** can be a blank value (no permission requirements), and the blank value can be copied.

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
Copying Event Content from the Content Library [page 174]
Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects

Date to start loading tasks to procurement operations desk

Specifies the date starting from which tasks associated with sourcing projects and sourcing requests in SAP Ariba Sourcing must be loaded to procurement operations desk. The date can be current or past.

ID	`Application.ProcurementDesk.TaskPushStartDate`
Name	**Date to start loading tasks to procurement desk**
Default value	`Mon, 1 Jan, 2018`

To specify the date from which sourcing tasks must be loaded to procurement operations desk, click the calendar icon and choose the appropriate date.

> Note
>
> This parameter is applicable only if the procurement operations desk capability is enabled in SAP Ariba Sourcing.

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

Procurement Operations Desk for Sourcing Solutions

Enable envelope for competitive event

If set to **Yes**, you can use envelope bidding for competitive events.

ID	`Application.AQS.RFX.EnableEnvelopeForCompetitiveEvent`
Name	**Enable envelope for competitive event**
Default value	**No**

If this parameter is set to **Yes**, you can use envelope bidding in competitive events.

“Competitive events” in the context of envelope bidding means events in which either of the event rules **Must participants improve their bids** or **Show lead bid to all participants** has a setting other than **No**, or events in which both of these rules have a setting other than **No**.

The default for this new parameter is **No**, meaning that you can't use envelope bidding in competitive events. If the parameter is set to **No**, and if you try to publish an event with envelopes that has either or both of these event rules not set to **No**, an error message will display.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager Administration
Event Envelope Rules
Must participants improve their bids
Event Market Feedback Rules
Event Sections [page 134]
Building Envelopes [page 135]
Parameter Management in Intelligent Configuration Manager

Hide event content until participant submits bidder agreement

Lets you hide a content item until the participant accepts the bidder agreement.

ID	`Application.AQS.RFX.HideContentUntilAgreementAccepted`
Name	**Hide event content until participant submits bidder agreement**
Default value	**No**

If you set this parameter to **Yes**, the **Visible to Participants?** setting has **Yes** and **No** options. **Yes** means that participants will see the content only after they accept the agreement.

If you set this parameter to **No**, the **Visible to Participants?** setting has a third option (**Yes after participant accepts the agreement**) that lets you hide a content item until the participant accepts the agreement.

⚠ Restriction

When the bidder agreement is updated, it's updated across the whole site, including past events. If you want to be able to update the agreement you have with bidders without changing your past and present events, use prerequisite questions instead. You can update prerequisite questions in the template to affect only future events.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager administration
Prerequisite Questions [page 84]
Parameter Management in Intelligent Configuration Manager

Hide Rollup Values from Users Who Can't Access All Child Values

ID	`Application.AQS.HideRollupValueForAccessControlledChildren`
Name	**Hide rollup values from users who can't access all child values**
Default value	**No**

If you set this parameter to **Yes**, rollup values (section or event values that show the sum of values for child items, such as Total Extended Price) are not shown to users who can't access values for all child items, such as users who cannot access an event section based on access control settings. Setting this parameter to **Yes** prevents users with restricted event access from using the rollup values to calculate the values they can't view.

If you set this parameter to **No**, rollup values are shown to all users who can access the event.

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

Let project creators bypass approvals for runtime edits

Specifies if a project owner with permission to create a project but without publish permission can skip the approval process for runtime edits.

ID	`Application.AQS.RFX.SuppressRuntimeEditApprovals`
Name	**Let project creators bypass approvals for runtime edits**
Default value	**No**

When a project owner has permission to create a project, but does not have publish permission, you can set this to **Yes** to skip the approval process for runtime edits (edits made to published events).

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

Multithreading for bid rank evaluation

Specifies if sourcing uses multithreading for real-time evaluation of leading bids.

ID	`Application.AQS.AggregateFunction.MultiThreadingEnabled`
Name	**Multithreading for bid rank evaluation**
Default value	**Yes**

Multithreading can improve performance for real-time evaluation of leading bids on the event monitor page.The number of threads is specified by `Application.AQS.AggregateFunction.NumberOfThreads`, which is configured by SAP Ariba and is 5 by default.

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
Viewing Real-Time Optimization Information [page 432]

Notify Active Team Members When Event Duration Changes or Event Reopens

If set to **Yes**, notifications are sent to active team members in addition to event participants when the event duration changes (extended or reduced) or the event is reopened. If set to **No**, these notifications are sent only to event participants.

ID	`Application.AQS.RFX.ChangeDurationReopenNotificationToActiveTeamMembers`

Name	**Notify active team members when event duration changes or event reopens**
Default value	**No**

When set to **Yes**, active team members and event participants get notified when the event duration is changed or the event is reopened.

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

Number of rows to retrieve for event-related data tables

Specifies the number of rows to retrieve when using scrolling for event-related data tables in classic sourcing events.

ID	`Application.AQS.RFX.EventDataTableScrollBatchSize`
Name	**Number of rows to retrieve for event-related data tables**
Default value	`0` (SAP Ariba Sourcing displays the table rows in batches of 40 each)

Specifies the number of rows to retrieve when using scrolling for event-related data tables. Setting this parameter to a lower value may improve performance when opening or viewing event-related data tables with many entries. At a minimum, set this value to the lowest number of rows displayed in event-related data tables based on the page size chosen by users, such as `20`. Setting this value too low can cause white space at bottom of the table when a user first opens an event.

The default value is `0`. When the value is 0, SAP Ariba Sourcing displays the table rows in batches of 40 each. The maximum value is `40`.

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
Parameter Management in Intelligent Configuration Manager

Retain Approval for Publish task status after Revert Draft

Specifies how to handle the status of **Approval for Publish** tasks if a user selects **Revert Draft** for an event.

ID	`Application.AQS.RFX.TaskAutoApprovalAfterEventRevert.Enabled`
Name	**Retain Approval for Publish task status after Revert Draft**
Default value	**No**

(Only applicable to classic sourcing.) In classic sourcing events, a user can choose to open a published event for editing, then select **Revert Draft** to discard any changes. If this parameter is **Yes** and the event has an **Approval for Publish** task, the previous status for the task (**Approved**) is retained. If this parameter is **No**, the task status is set to **Cancelled**.

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

Roll up term values in alternative bids

Roll up values in alternative bids.

ID	`Application.AQS.RFX.RollupAlternativeAttributeValue`
Name	**Roll up term values in alternative bids**
Default value	**No**

When the **Rollup in section summary** option is enabled for a numeric term (such as **Price**) and items in an event are structured in a hierarchy (such as a section with line items below it), the values for the term are summed up (rolled up) and shown at the top level of the hierarchy.

By default, term values are not rolled up for alternative bids. Set this parameter to **Yes** to roll up term values in alternative bids that have the **Rollup in section summary** option enabled.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

> ⓘ Note
>
> This parameter is applicable for classic sourcing only and not for guided sourcing.

Related Information

Intelligent Configuration Manager administration
Parameter Management in Intelligent Configuration Manager

Send draft award scenarios to external ERP systems

Enables users to send draft event awards to external ERP systems.

ID	`Application.Integration.ExternalSystem.EnableSendDraftQuotes`
Name	**Send draft award scenarios to external ERP systems**
Default value	**No**

If this parameter is set to **Yes**, users who have created a "draft" award scenario (an award scenario that has not been awarded) for an event that is integrated with an external system can send the award information to the external system.

If this parameter is set to **No**, users can only send award information to an external system after the award scenario has been awarded.

A member of the **Customer Administrator** group sets this parameter in the **Intelligent Configuration Manager** workspace.

Related Information

Intelligent Configuration Manager Administration
Exporting Event Draft Contracts to External Systems [page 345]
Parameter Management in Intelligent Configuration Manager

Send draft changes for published events to all users

Specifies if notifications sent to approvers of **Approval For Publish** tasks for changes to previously published events include a summary of the draft event changes. When this parameter is set to **No**, the summary is only included if email approvals are enabled. When this parameter is set to **Yes**, the summary is included , even when email approvals are not enabled.

ID	`Application.ACM.SendDeltaEmailAttachmentToInternalApprover`
Name	**Send draft changes for published events to all users**
Default value	**No**

An event can have an **Approval For Publish** task, which requires the event to be approved before it is published. If this task is configured with the **Repeat For Each Document Draft** option enabled, changes to a published event start a new **Approval For Publish** task.

When this parameter is set to `No` and an **Approval For Publish** task is created for changes to a published event, the task notifications sent to approvers include an attachment with a summary of the draft event changes only if email approvals are enabled; that is, if **Send draft changes for published events to all users** (`Application.Base.EmailApprovalEnabled`) is set to `Yes`.

If set to `Yes` and an **Approval For Publish** task is created for changes to a published event, notifications sent to approvers include an attachment with a summary of the draft event changes, even when email approvals are not enabled.

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

Show Event Description field to participants

Specifies whether to show the **Event Description** field to participants.

ID	`Application.AQS.RFX.ShowDescriptionToParticipants`
Name	**Show Event Description field to participants**
Default value	**No**

The default value, **No**, specifies to keep the description internal only.

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 unit of measure for item

Allows you to synchronize the unit of measure for quantity-type terms for an item.

If this parameter is set to **Yes**, the first time the Unit of Measure (UoM) for a quantity-type term is changed, the UoM is automatically changed for all quantity-type terms in the same item. The new UoM also becomes the default UoM for all new quantity terms added to this item.

ID	`Application.AQS.RFX.SyncUoMForItem`
Name	**Synchronize unit of measure for item**
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

Types of sourcing projects a user can create

Specifies the sourcing project types available for a user to choose from while creating a sourcing project.

ID	`Application.AQS.AllowableProjectType`
Name	**Types of sourcing events that the project owner can create**
Default value	`0`

Supported parameter value	Meaning
0	Project type defaults to Quick Project. Project owners can choose either **Full Project** or **Quick Project**.
1	Project owners can create only Full Projects. The option to choose **Quick Project** is not available.
2	Project owners can create only Quick Projects. The option to choose **Full Project** is not available.
3	Project type defaults to Full Project. Project owners can choose either **Full Project** or **Quick 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

Validate ERP fields for Import Sourcing Event web service

This parameter is for the Import Sourcing Event web service. If set to **Yes** and the `SourcingProjectImportRequest` includes custom header-level external system integration fields in the `ProjectHeaderFields`, they're validated before the sourcing event is created or updated.

ID	`Application.ACM.ValidateERPFieldsEnabled`
Name	**Validate ERP fields for Import Sourcing Event web service**
Default value	**No**

If your site is configured for material master data integration with an external system and the site configuration parameter `Application.ACM.ValidateERPFieldsEnabled` is set to **Yes**, the Import Sourcing Project web service can accept a `ProjectHeaderFields` element with the following header-level integration fields:

- External system
- Company Code
- Payment Terms
- Purchasing Group
- Purchasing Organization

In addition, SAP Ariba Sourcing validates the incoming integration field against values in the Material Master data for the external system. If award data is sent back to the external system (by selecting **Actions** > **Send Quotes to External System**), SAP Ariba Sourcing also sends these values back to the external system with the award data.

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

Validate formulas only within a batch when importing event content from Excel

Specifies scope for validating formulas when processing event Excel file rows in batches.

ID	`Application.AQS.RFX.ExcelImport.PartialDataCommitByBatchValidation`
Name	**Validate formulas only within a batch when importing event content from Excel**
Default value	**No**

Specifies the scope for validating formulas when importing event content from Excel files with a large number of rows. If you import an Excel event file with a large number of rows, sourcing processes the rows in batches.

If this parameter is set to **Yes**, sourcing validates only the formulas in the batch it is processing; this can improve performance when importing Excel event files with a large number of line items and multiple formulas.

If this parameter is set to **No**, sourcing validates all formulas in the Excel event file each time it processes a batch of rows.

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

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