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Managing Events with Guided Sourcing

SAP Ariba Sourcing
SAP Strategic Sourcing Suite
SAP Ariba Start Sourcing

THE BEST RUN

Content

Managing Events with Guided Sourcing

Guided sourcing is an optional SAP Ariba Sourcing feature that provides a streamlined interface for managing events.

Read this guide if your site has guided sourcing enabled and you're a procurement professional who:

- Creates Request for Proposal (RFP) or real-time, online auction events to solicit pricing and other information from suppliers.
- Creates Request for Information (RFI) events to explore solutions to procurement needs. You use RFIs to send questionnaires to suppliers and to qualify suppliers based on their responses.
- Monitors events to see the supplier responses you've received.
- Evaluates responses, then awards event items to suppliers.
- Want to use SAP Analytics Cloud machine learning to analyze your organization's previous events and recommend suppliers and event content.

This guide applies to:

- SAP Ariba Sourcing
- SAP Ariba Strategic Sourcing Suite

Related Guides

Setting Up Guided Sourcing

Event Management Guide

Event Rules Reference Guide

Project Template Guide

Managing Projects, Teams, Documents, and Tasks

Managing Public Procurement Events

About Guided Sourcing

Members of the **Category Buyer** group can use guided sourcing to create sourcing projects and run sourcing events.

Guided sourcing provides a streamlined and intuitive user experience for creating and managing sourcing projects and events. You can also configure guided sourcing to use SAP Analytics Cloud machine learning to analyze your organization's previous events and recommend suppliers and event content.

Sourcing events are RFPs, RFIs, or auctions, which enable you to solicit pricing and other sourcing information from suppliers. All events (RFPs, RFIs, and auctions) are contained in a project, either a full project or a single-event project. (A single-event project is referred to as a "quick project" in classic sourcing).

A **full project** can contain multiple events and supports all project management features, including phases, tasks, project documents, and project teams. Full projects can also contain multiple subprojects with events that share planning and savings tracking information. Full projects enable multiple users to work on the same documents or events with defined roles and processes, as well as tasks.

A **single-event project** can contain only one event with limited project management features. Single-event projects can contain documents only as items or attachments in the event. Single-event projects support project teams with no limitations. Single-event projects do not support phases and support only the following event-specific tasks:

- **Approval for Publish**
- **Approval for Award**
- **Review for Team Grading**
- **Approval for Team Grading**
- **Approval for Timing Change**

For more information about event-specific tasks, see Managing Event Tasks in Guided Sourcing [page 478].

Many users typically refer to single-event projects simply as "events" because most of the project features are hidden. In the classic user interface, single-event projects are referred to as "quick projects."

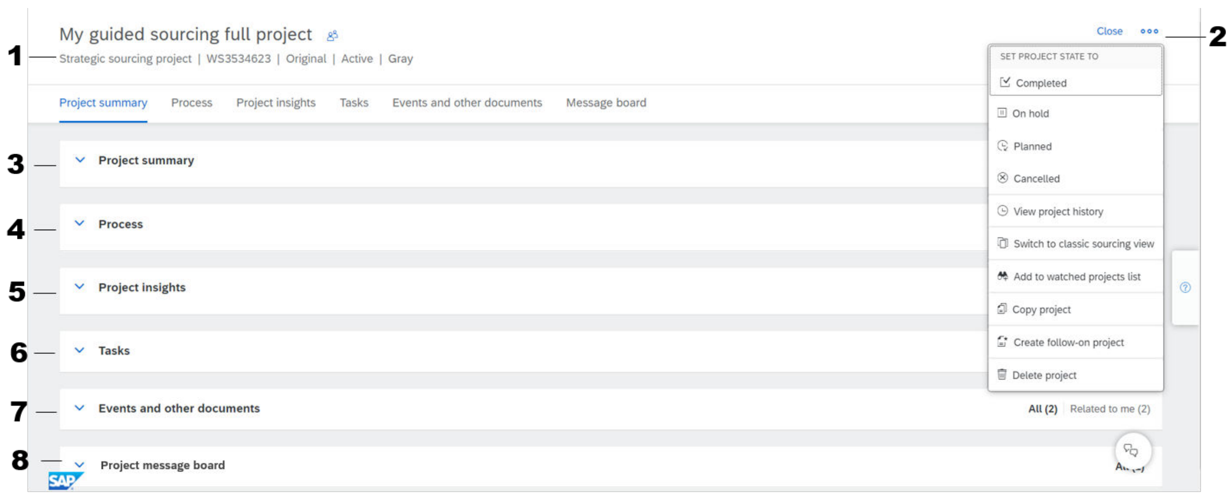
Guided Sourcing Full Project Features

Guided sourcing provides a streamlined interface for full projects.

Guided sourcing provides the following features for full projects:

- A single-page project interface that simplifies navigation and content management
- Project insight tiles to easily monitor the project's progress and quickly access its contents
- A streamlined project creation page that enables users to quickly create projects by copying existing projects or by using templates with boilerplate content
- Template authors have enhanced control over the events that can be created inside a sourcing project

The guided sourcing interface for full sourcing projects uses a single-page design to present project content in a simple and actionable way:



The main guided sourcing full project page contains the following components:

- Project header area
- Project header **More actions** menu
- **Project summary** panel
- **Process** panel
- **Project insights** panel
- **Tasks** panel
- **Events and other documents** panel
- **Project message board** panel

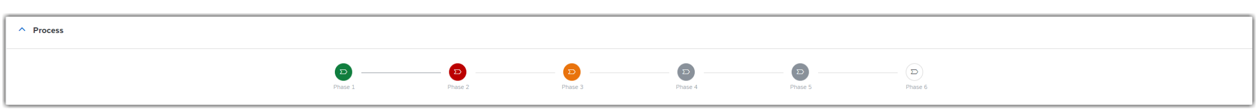
Project Header Area

Navigate the project's panels quickly with the links in the header and use the **More actions** menu for high-level project functions.

Project Summary Panel

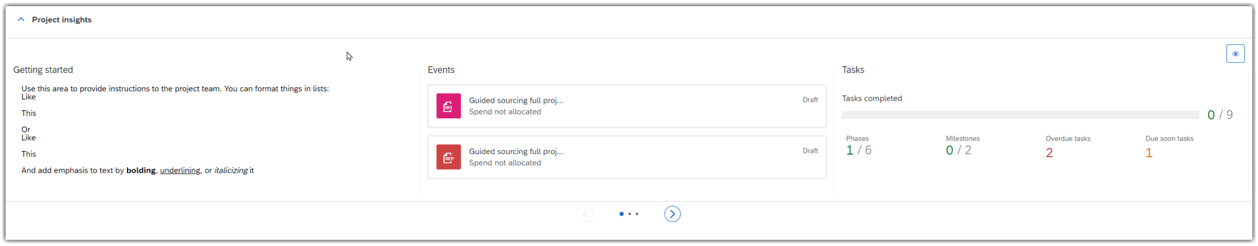
Easily edit key details, including the project's header fields, directly from the project page.

Process Panel



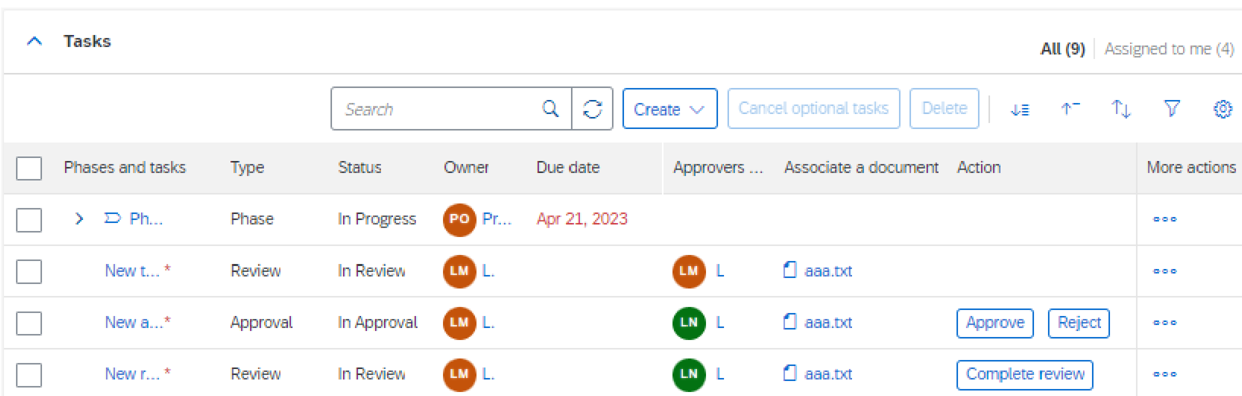
Track project progress visually with the **Process** panel's diagram.

Project Insights Panel



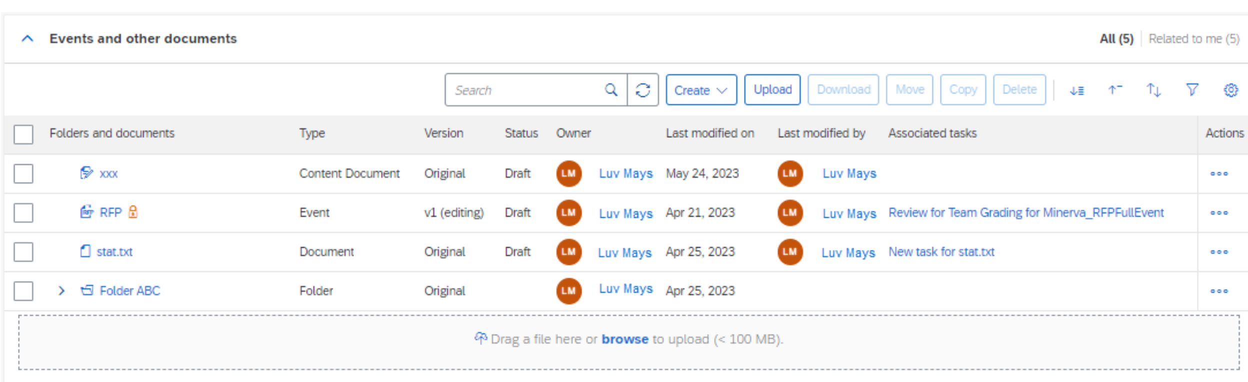
Use the **Project insights** panel's insight tiles for easy access to project documents and a clear visual summary of different project components.

Tasks Panel



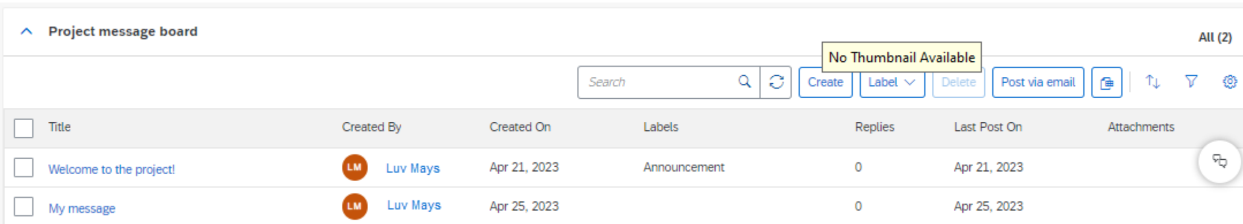
Create, rearrange, and complete tasks and phases directly from the **Tasks** panel.

Events and Other Documents Panel



Upload documents, create events and subprojects, and organize content into folders in the **Events and other documents** panel.

Project message Board Panel



Post messages and replies in the **Project message board** panel to communicate with project team members and participants. For more information, see Communication and Messaging in Guided Sourcing [page 541].

Additional Full Project Features

The guided sourcing full project interface also includes a streamlined user interface for other project activities, including:

- Task, phase, and folder creation
- Task, phase, folder, and document detail views
- Task approval flows
- Project activity history
- Seamlessly access internal and external applications by clicking the `custom` actions menu options in the guided sourcing user interface

> ⓘ Note
>
> Depending on the configurations done by your organization for the guided sourcing full project template, the `custom` actions menu appears in the guided sourcing full projects that are created from the template.

Guided Sourcing Event Features

Guided sourcing provides a streamlined interface for sourcing events.

Guided sourcing supports multiple event types [page 31], including Request for Proposal (RFP) and auctions, and a number of bid format options [page 408], including sealed bids, multi-round bidding, and email bidding.

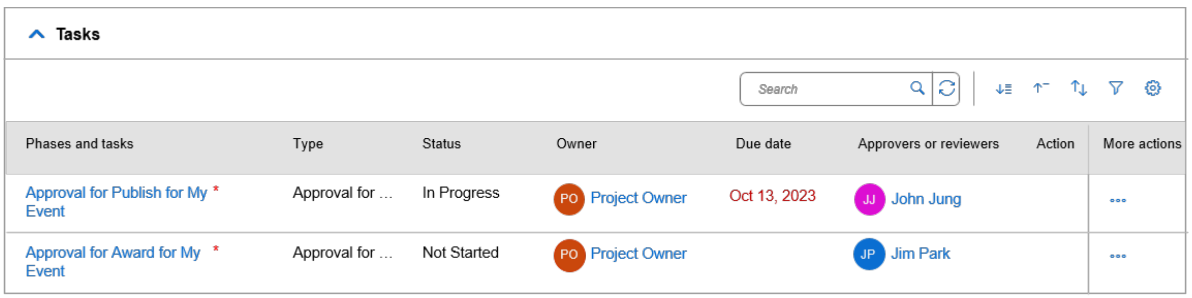
> ⓘ Note
>
> The guided sourcing user interface is undergoing several changes. For more details, see Ongoing User Interface Updates for Guided Sourcing.

Guided sourcing helps users perform the following tasks for events:

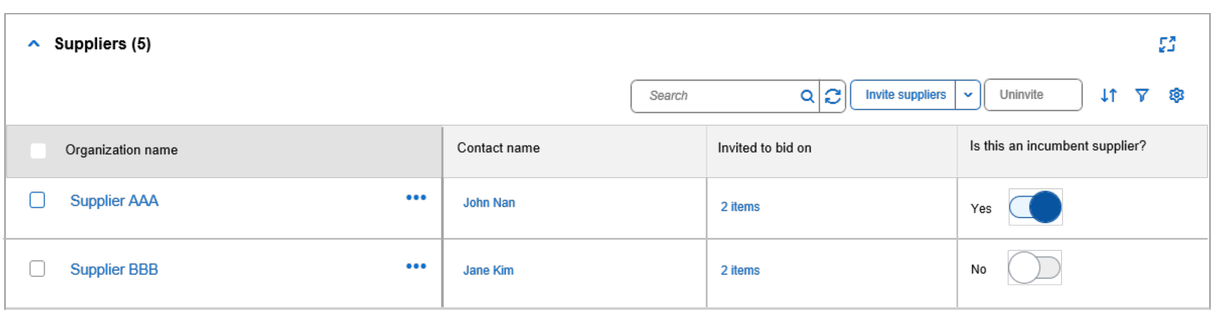
- Quickly and easily create sourcing events. Users can create an event as a single-event project by:

  - Copying an existing single-event project.
  - Using the SAP Ariba **smart import from Excel** feature. The smart import from Excel feature uses machine learning to analyze and learn your organization's Excel structures and create event content from your Excel documents.
  - Starting with a template, which can contain boilerplate language, attachments, and specifications for the information you want to collect from suppliers.

  Users can also create an event in a full project. Depending on the full project template contents, users can also create an event in a full project by:
  - Creating an event inherited from the full project template
  - Creating an event from an event template specified for reuse in the project template
- Manage tasks for events. If your event contains a task (such as an **Approval for Publish** or **Approval for Award** task), the event page contains a **Tasks** panel from which you can open tasks, view the approval flow and make limited changes. If you're the active approver, the **Action** column contains buttons to approve or reject (deny) the event or award.



- Add suppliers (participants) to your event. These suppliers are invited to submit bids or responses for items or questions in the event. The suppliers are organized in a table with links to supplier cards that show contact information, qualifications, certificates, and a summary of recent supplier sourcing activities. Pagination is enabled for this table and supplier records are listed in batches of 50. You can click a link in the **Invited to bid on** column to open a list of items a supplier is invited to bid on and uninvite the supplier for specific items. You can also use the toggles in the **Is this an incumbent supplier?** column to specify if a supplier is an incumbent or not. The options to add (invite) and remove (uninvite) suppliers are available only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.



  If your site integrated with SAP Ariba Supplier Management Solutions, you can navigate to the supplier 360° profile in the SAP Ariba Supplier Management Solutions for a supplier from the supplier card in guided sourcing events. The supplier 360° profile in SAP Ariba Supplier Management Solutions shows all of the information your organization has collected about a supplier. You can navigate to the supplier 360° profile from the list of suppliers or supplier search results in a guided sourcing event that you create or edit in the guided sourcing user interface.

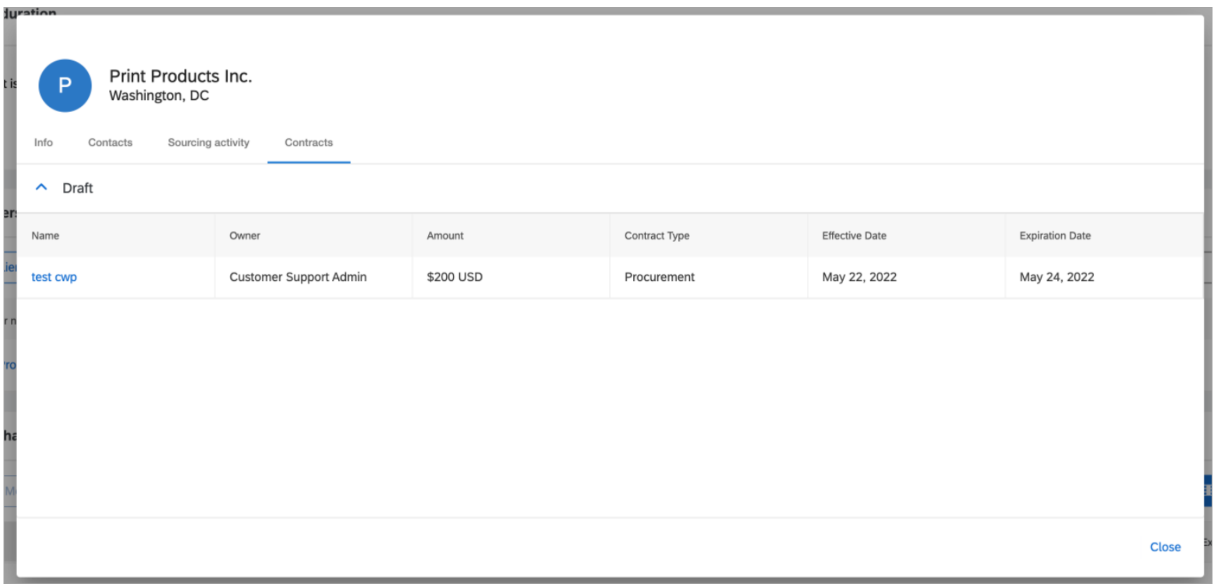
  If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, the **Risk level** column displays the risk level of suppliers as hyperlinks. The possible values for **Risk**

level are **High**, **Medium**, **Low**, and **Unknown**. The risk-level information is obtained from the Supplier Lifecycle and Performance API. The value **Unknown** is assigned to a supplier when there is a risk project associated but the supplier's risk-level information is not available in the system. However, if there is no risk project created, the value in the **Risk level** column for the corresponding supplier is displayed as empty. Click the hyperlink in the **Risk level** column for an event to open the supplier risk card with the following details:

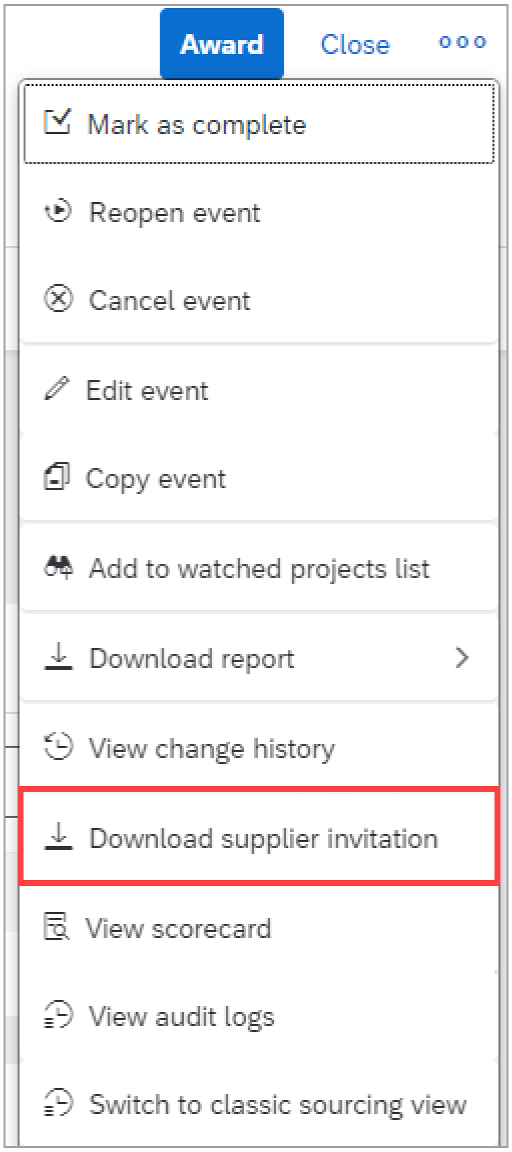
- **Name**: The categories on which the risk is measured are displayed.
- **Score**: The **Overall Risk** score for the supplier with the risk score breakdown for each category is displayed in percentage. The value can range between 0 to 100 and can be in decimal.
- **Risk level**: The **Overall Risk** level for the supplier with the risk level breakdown for each category are displayed. The possible values are **High**, **Medium**, **Low**, and **Unknown**.

If your site integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Management Solutions, you can link existing supplier risk engagement projects to a guided sourcing event and seamlessly navigate between the supplier risk engagement projects and the supplier card in the guided sourcing.

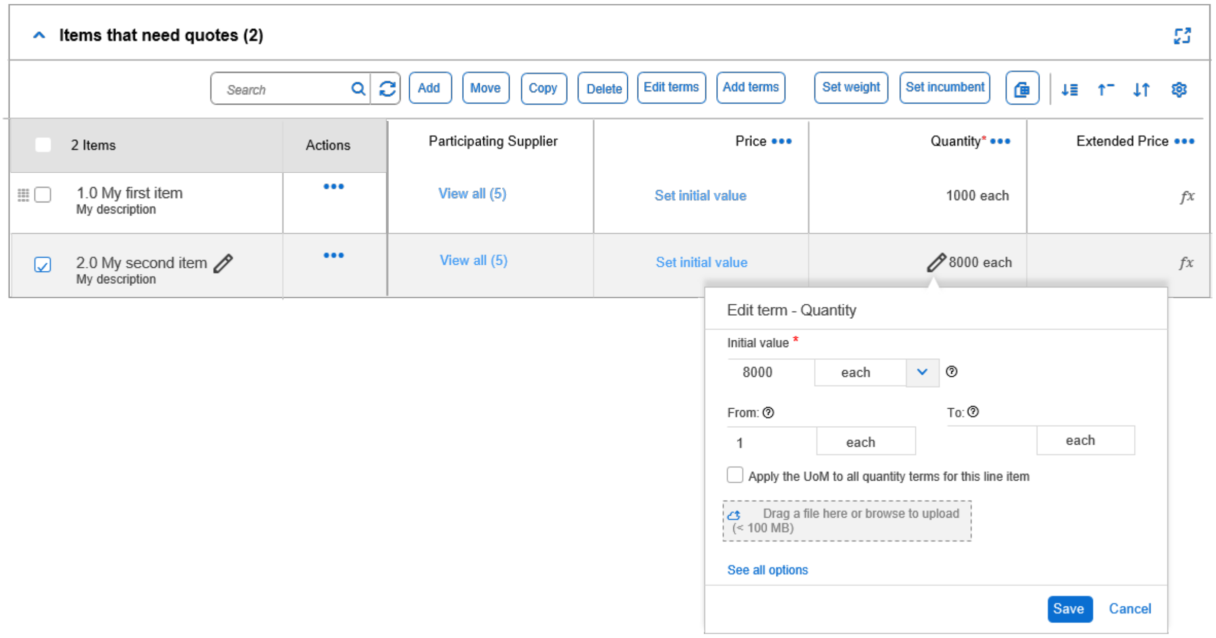
- Review contract information in the supplier card when you click the supplier's name in the following event panels:
    - **Items that need quotes** panel of the **Monitor** page
    - **Award allocation** panel of the **Review responses** page
    - **Best Bid award allocation** panel of the **Award** page



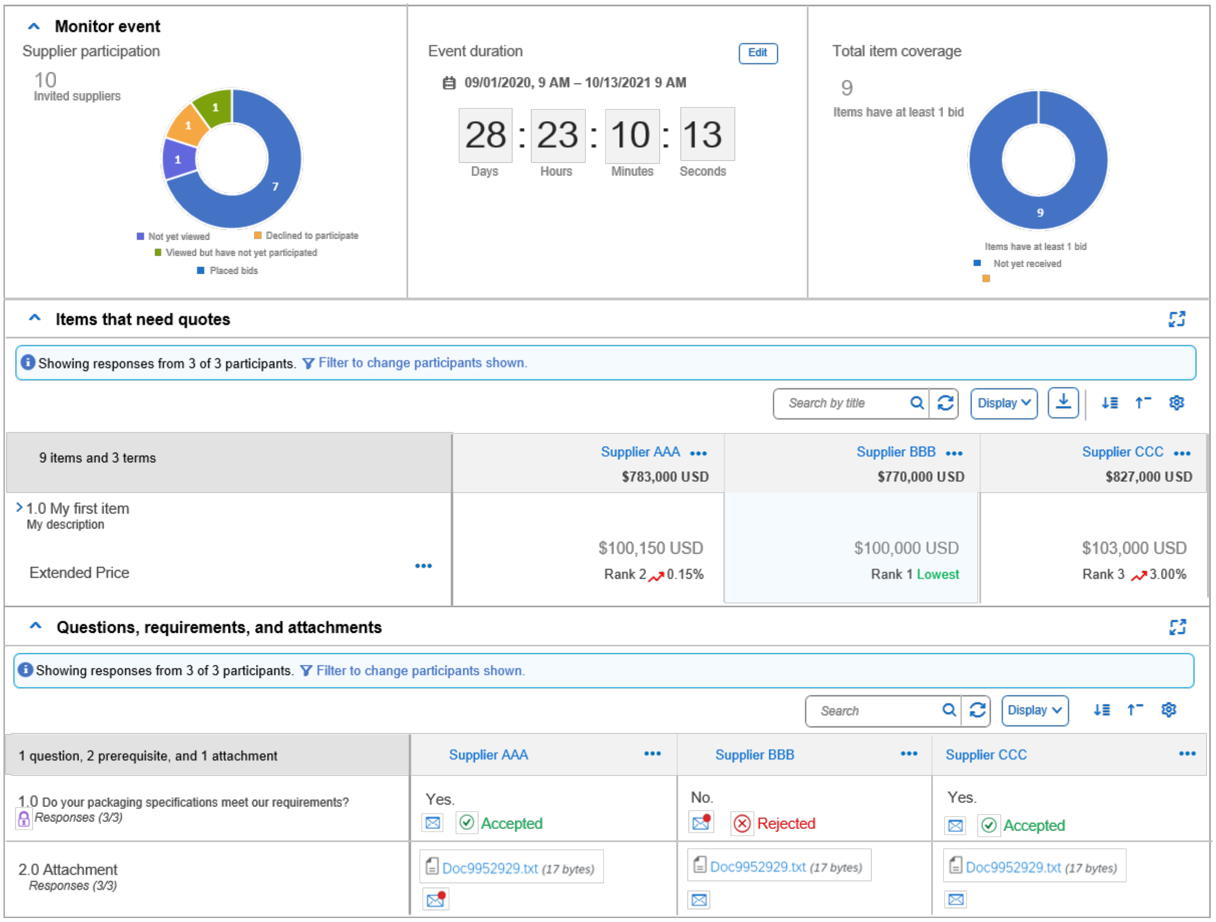
- Export a list of invited suppliers (participants) into an Excel file from an opened event during the following phases: **Create**, **Monitor**, **Review responses**, and **Award**. You can create a report by clicking more actions icon (...) and select **Download supplier invitation** to select any or all columns of the supplier information (Creating Excel Supplier Invitation Reports [page 605]).



- Easily copy, add, and edit multiple line items (items that you are soliciting price quotes for).
  Line items and other event content (such as questions or attachments) are organized in tables that let you easily view, edit, move, and copy items. For line items, you can edit term values directly in table entries. You can also select multiple line items and add or edit term values for all selected items in a single "bulk edit" operation.



- Seamlessly access internal and external applications by clicking the `custom` actions menu options in the guided sourcing user interface.
  Depending on the configurations done by your organization for the guided sourcing event template, the `custom` actions menu appears in the guided sourcing events that are created from the template. You can quickly access other applications from a guided sourcing event by using the `custom` actions menu. You can get updates from other applications reflected in the guided sourcing event.
- Monitor events. After an event is published, it's easy to see which suppliers have responded, the time remaining in the event, how many items have been bid on, and the leading bid for each item:

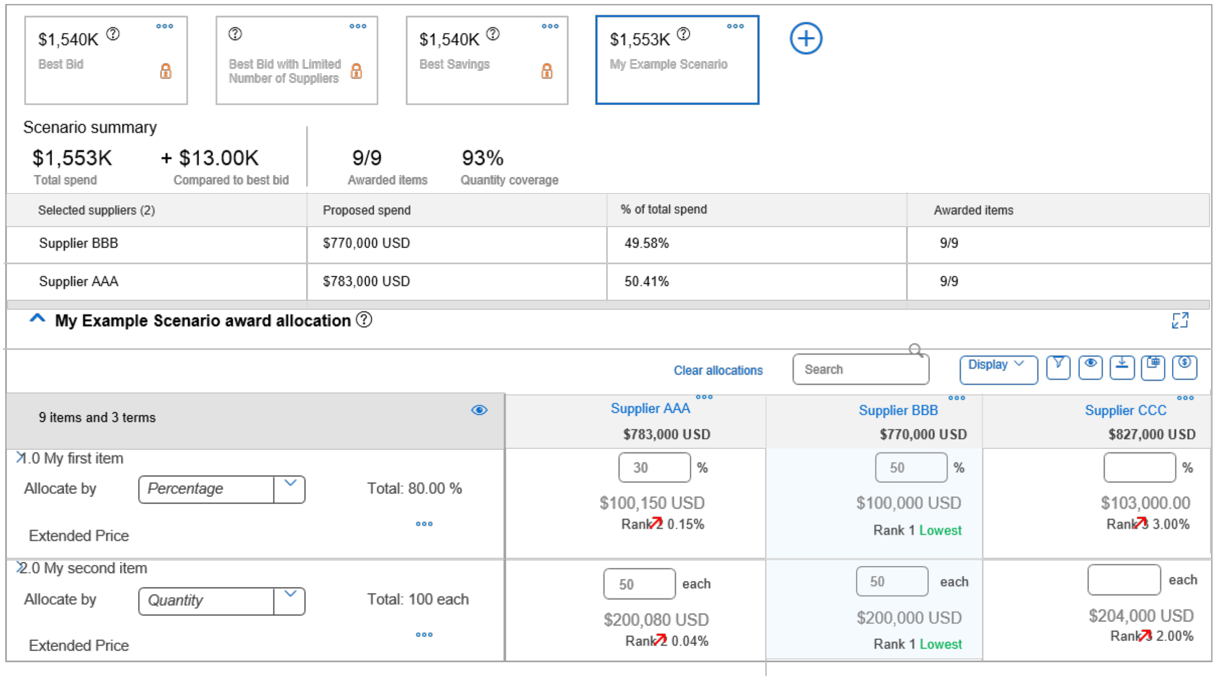


For auctions, guided sourcing also provides a bid console. The **Bid console** page provides you the following details in near real time:

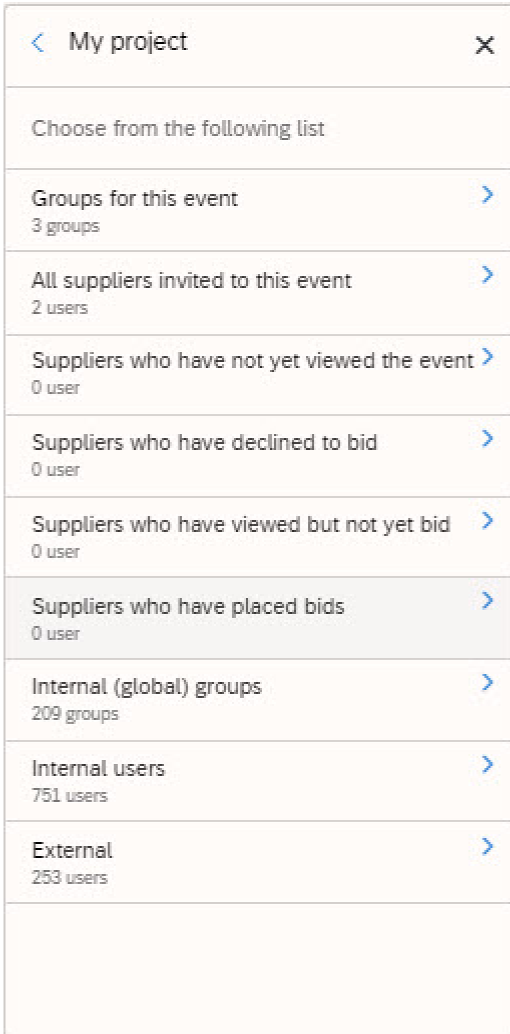
- Supplier participation information, such as number of suppliers invited, participated, and declined, in graphical format and as text.
- Recent bid information such as items, suppliers, and bid amounts.
- Event duration information such as start time, end time, and remaining time.
- A graphical representation of bids received for the event.
- A table that lists the lots and items and provides information such as status of the item, historical price, lead bid, and lead bidder for the item.
- A watch option that enables you select up to four items and view the bid details for those item in cards that contain tabular and graphical representation of the bid data. The watch option also provides a graph view that shows the bids for all selected items and a bid history table.

- Add bidding rounds to the same event (multi-round bidding [page 456]).

- Easily evaluate supplier responses and award items to suppliers. Guided sourcing provides a streamlined user interface to evaluate possible awards and to create awards:



- Quickly and easily communicate with team members, other users in your organization, and suppliers using an interactive messaging popup:



> **Note**
>
> All messages exchanged using the messaging popup are stored in the SAP Ariba data center located in the United States, regardless of the data center your organization selected to host your SAP Ariba Sourcing solution.

Integration with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance Solutions

You can search for suppliers for guided sourcing events based on risk levels. For more information, see Searching for Suppliers for Guided Sourcing Events Based on Risk Levels [page 271].

Integration with SAP Ariba Contracts

If your site has SAP Ariba Contracts, you can integrate contract workspaces with guided sourcing and perform the following tasks:

- Create contracts from awarded guided sourcing events.
- Add awarded line items to existing contracts.
- View expiring contracts in guided sourcing events.
- Manage baseline contracts and supplier contracts associated with guided sourcing events as part of the pre-award negotiation process.

For You Dashboard and Guided Sourcing

You can use the **For You** dashboard for easy access to guided sourcing events.

The **For You** dashboard includes the following components:

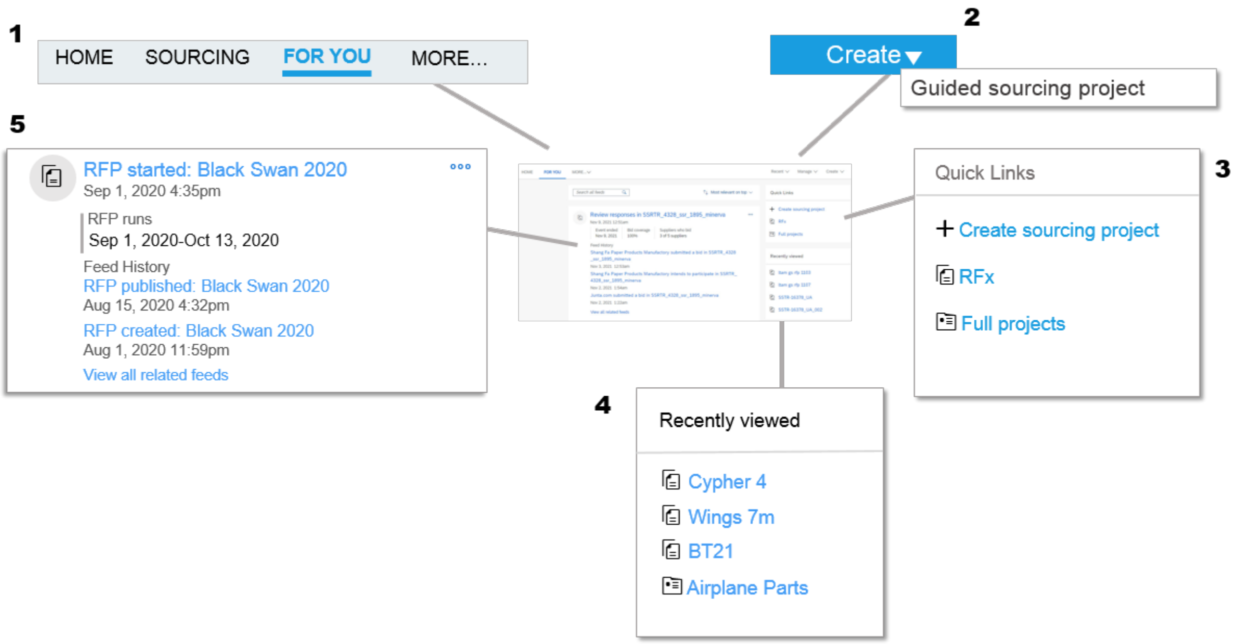
1. Solutions menu bar.
2. **Create** menu. To create a guided sourcing full project or single-event project (event), select **Guided sourcing project**.
3. **Quick Links** panel.
    - Select **Create sourcing project** to create a guided sourcing full project or single-event project (event).
    - Choose **RFx** or **Full projects** to open a search page for events or full projects.
4. **Recently viewed** panel. Click an event name to open the event.
5. Feed cards for recent events that have occurred, such as:
    - A guided sourcing project was created or a guided sourcing event was created or published.
    - A supplier (participant) has submitted a response to state that they intend to or decline to participate in an event, or submitted a response with bids or other information.
    - The response time for a guided sourcing event has ended and the event changed status to the pending selection status.
    - An award was created for a guided sourcing event.

    From a feed card, you can:
    - Click an event or full project name to open it.

        > **Note**
        >
        > By default, full projects created in the classic user interface (classic full sourcing projects) open in the classic user interface. An administrator for your site can configure the parameter **Control how full sourcing projects are opened for Category Buyer users** so that classic full sourcing projects open in the guided sourcing user interface for **Category Buyer** users.

    - Click **View all related feeds** to view all feed cards for the event.
    - Click the name of an event approval task or full project name that is assigned to you to open the **Tasks** panel in the event. From the **Tasks** panel, you can approve or deny the task.
    - To see recent changes, refresh your browser. There may be a delay of up to 5 minutes for feed cards to reflect new activity.

- Use the horizontal expand (›) or collapse (‹) icon to expand or collapse the feed cards on the left side of the page or the navigation panels (such as **Quick links**, **Expiring contracts**, **Recently viewed**, **Watched projects**) on the right side of the page.



Active Feedback Collection in Guided Sourcing

Guided sourcing contains in-built tools for collecting user feedback.

The in-built user feedback collection tools in guided sourcing are:

- A feedback icon in the shell bar that gives users easy access to feedback forms.
- Time-controlled push surveys that encourage users to provide feedback about the product.

The feedback icon on the shell bar helps users access the anonymous survey titled **Your Opinion Matters**. The survey contains a few multiple choice questions and a free-text question.

The time-controlled push surveys are anonymous random surveys that are launched after the user agrees to take part in the survey.

The feedback collected through these surveys are used to improve guided sourcing.

SAP Ariba Sourcing Features Supported with Guided Sourcing

Guided sourcing supports a number of full project features available in the classic user interface, including the following:

- Project creation
  - Creating new projects by using existing templates or copying previous projects
  - Setting project detail fields and external system fields (if applicable)
  - Using template conditions and questions
- Linking projects
  - You can link projects as predecessor and follow-on projects to create a multi-stage project. A multi-stage project enables you to copy the content, suppliers, and bids from one event to the next. You can use multi-stage projects to model the different stages of a multi-stage negotiation.
- Project settings
  - Setting predecessor and follow-on relationships between projects
  - Creating team groups
  - Creating separate teams for parent projects and subprojects
- Information about full sourcing projects in the **For You** dashboard, live feed, and in the guided sourcing projects search results. This includes information about full sourcing projects created using the classic user interface. When a user clicks a classic full project name from guided sourcing, the project opens in the SAP Ariba Sourcing classic user interface
- RFQ and award integration with external systems, including sourcing requests
- Tasks and phases
  - Creating and working with the following types of tasks
    - To do
    - Approval
    - Approval for publish
    - Approval for award
    - Review
    - Review for team grading
    - Notification
  - Creating phases and subphases to organize tasks
  - Creating recurring phases to schedule repeating processes
- Documents and folders
  - Uploading new documents
  - Copying documents from other projects
  - Creating the following types of SAP Ariba documents and subprojects in the guided sourcing interface:
    - Sourcing events
    - Sourcing subprojects (single-event projects and full projects)
  - Creating the following types of SAP Ariba documents and subprojects in the classic SAP Ariba Sourcing interface:
    - Savings forms

        - Analytical reports
        - Procurement contract workspace subprojects
    - Previewing TXT, DOCX, and PDF files from the full project interface
    - Creating folders and subfolders to organize documents
    - Creating tasks associated with documents and folders
- Project message board

Guided sourcing supports the following SAP Ariba Sourcing features for events:

- RFIs and RFPs
- English, Dutch, and Japanese reverse auctions
- English and Dutch forward auctions
- Line items, lots (item lots and basket lots), and sections
- Service items and service hierarchies
- Questions, prerequisites, requirements, and attachments
- Importing line items and sections using simplified Excel imports and smart imports from Excel
- Participant-specific initial values for terms
- **Approval For Publish** and **Approval For Award** tasks
- Event monitoring table with bid ranks
- Bid analysis
- Preconfigured award scenarios:
    - **Best Bid**
    - **Best Bid with Limited Number of Suppliers**
    - **Best Savings**
- Manual award scenarios
- Event message board
- Event notification emails
- Analytical reporting; data from guided sourcing events is available in SAP Ariba Sourcing reporting facts
- Email bidding
- Dynamic lookup tables
- Multiple currency events
- Alternative bidding
- Supplier-added items
- Service hierarchies
- Envelope bidding
- Integration with SAP Ariba Contracts (you can create a contract workspace from an award)
    - View contract information from the supplier card in an opened event.
- Grading and scoring
    - Use team grading to allow differing opinions to grade supplier responses
    - Set graders' weights to change the final score, for example, to give experienced graders a higher weight than junior graders
    - Enable blind grading to increase objectivity and reduce bias

Guided sourcing supports standard-capacity events but does not support large-capacity events. For standard-capacity event size limits, see Event content limits.

Guided sourcing supports events that contain up to 2000 line items, 20 terms per item, and 100 suppliers with no performance impact. Creating guided sourcing events with items or suppliers that exceed these values may cause performance degradation.

> ⓘ Note
>
> If the **Can participants see ranks?** template rule is set to a value other than **No**, the event becomes competitive.
>
> In such cases, you can add only up to 200 top-level items to an event.

The following is a non-exhaustive list of features not supported in guided sourcing full projects. To use these features, you must create a sourcing project using the classic SAP Ariba Sourcing interface (accessible from the dashboard by selecting **Create** > **Sourcing project**).

- Project area: Event messages
- Tasks and task-related features
  - Negotiation tasks
  - Tasks that restart with each new draft of a document
  - External reviewers for review tasks
  - Access controls for task comments
- Documents
  - Creating the following documents from the guided sourcing project interface:
    - Compound reports
    - Dynamic and custom forms
    - Surveys

A non-exhaustive list of SAP Ariba Sourcing features available in the classic user interface but not supported for guided sourcing events includes large-capacity events. To use these features, you must create an event from a template for the classic user interface (a template with the field **Guided Sourcing Template** set to **No**).

The guided sourcing UI currently does not provide an option to delete bids. However, *Event Administrator* or *Limited Event Administrator* users can delete bids from the classic user interface of SAP Ariba Sourcing as described in Deleting Event Bids.

You cannot search for article master items based on categories. However, sites using the "Commodity support for Category Attribute Hierarchy" feature can automatically add content to events based on the commodity values for items.

Support for Bid Analysis

Support for bid analysis enables buyers using guided sourcing to perform bid analysis tasks for sourcing 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. For more information, see About bid analysis in the *SAP Ariba product sourcing guide*.

You can create a single award or create split awards from the bid analysis user interface in guided sourcing. For more information, see Using Bid Analysis to Award Guided Sourcing Events [page 530].

Support for Dynamic Lookup Tables

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. For more information, see About dynamic lookup tables and lookup formulas and .

Support for Cost Breakdown and Pricing Conditions

Buyers using guided sourcing can:

- capture detailed cost breakdowns by creating a guided sourcing event with the cost group terms. For more information, see Capturing detailed cost breakdowns.
- define pricing conditions in guided sourcing events. For more information, see About Using Pricing Conditions in Guided Sourcing Events [page 341] and About creating sourcing projects and events in product sourcing.

Accessibility

Guided sourcing support accessibility features in the form of keyboard shortcuts to enable people with special needs to access content and perform various tasks. The keyboard shortcuts are available through the event management process, that includes creating and editing events, reviewing responses, and awarding events.

Browser Recommendations and Restriction for Guided Sourcing

SAP Ariba recommends that you use one of the following browsers to access guided sourcing:

- Apple Safari (64-bit)
- Google Chrome (64-bit)
- Microsoft Edge (32-bit)
- Mozilla Firefox (64-bit)

If you use Microsoft Internet Explorer to access guided sourcing, it may take several seconds to load pages or to show user input.

See Supported Browsers for additional information.

> ⚠ Restriction
>
> Guided sourcing does not support browser page refreshes. If you refresh a guided sourcing UI page (for example, by pressing **F5** or **CTRL-r**) you'll lose any unsaved changes on the page and may return to a previous page.

Guided Sourcing Event Types

Guided sourcing events are RFPs, RFIs, or auctions, which enable you to solicit pricing and other sourcing information from suppliers.

Guided sourcing supports the following types of events:

- Request for Information (RFI) events
  RFIs generally contain questions to gather non-competitive data, information, comments, or reactions from potential participants. RFIs typically do not solicit pricing information. Instead, RFIs usually precede other events (RFPs or auctions) that solicit pricing.
  If you do not need pricing quotes from suppliers and only want to collect information from suppliers and qualify suppliers, create an RFI event.
- Request for Proposal (RFP) events
  RFPs generally contain items that you want to collect pricing information for, such as goods and services. Like Requests for Information (RFI) events, RFPs can include questions to qualify participants.
- Auctions. Auction are real–time online events during which participants submit competitive bids for specific goods or services. Guided sourcing supports the following types of auctions:
  - 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.
  - 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.
  - Dutch auctions
    In a Dutch auction, prices automatically rise (for reverse auctions) or fall (for forward auctions) over time.
  - Japanese auctions
    In a Japanese auction, participants are required to accept pricing at levels that automatically adjust at regular intervals to continue in the auction.

Guided sourcing also supports a number of options [page 408] for you to handle bids and responses and for participants (suppliers) to submit bids:

- Multi-currency events: In multi-currency events, buyers allow suppliers (participants) to select currencies to use in bids, which can be different than the currency for the event. and can choose whether to share current exchange rates with suppliers.
- Sealed bidding: Sealed bidding enables buyers to see supplier participation status and log activities but prevent buyers from seeing incoming bids.
- Envelope bidding: Envelope bidding enables buyers to enclose the content of their guided sourcing events in different envelopes, which conceal participant responses. Envelopes are opened in sequence, and you can configure different users to open each envelope. This enables buyers to have an unbiased evaluation of participant responses.
- Alternative bidding: Alternative bidding gives suppliers (participants) the ability to submit alternate bids after they have submitted a primary bid based on a guided sourcing event as you have defined it. You can then view the primary and alternative pricing responses and decide what meets your needs the best.

- Email bidding: Email bidding enables buyers to allow suppliers email their bid sheets as Microsoft Excel file attachments.
- Custom offline response sheets: Custom offline response sheets enable you to create and import your own customized version of an offline bid sheet for guided sourcing events.
- Multi-round bidding: Multi-round bidding enables you to refine pricing and other information by creating additional bidding rounds in a single event.
  SAP Ariba also supports multi-stage projects [page 131], which enable you to link together multiple events as predecessor and follow-on events. When you create a follow-on event, you can choose to copy supplier, item, and bid information from the predecessor event.
- Supplier-added items: You can create guided sourcing events that allow suppliers to add items and lots to primary and alternative bids.

About Request for Information (RFI) Events [page 32]

About Request for Proposal (RFP) Events [page 33]

About Auctions [page 34]

About Reverse Auctions (English Reverse Auctions) [page 34]

About Forward Auctions [page 35]

About Dutch Auctions [page 36]

About Japanese Auctions [page 36]

About Content Item Limits for Guided Sourcing Events [page 37]

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.

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.

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)

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)

About Content Item Limits for Guided Sourcing Events

Guided sourcing events have limits for the number of content items. These limits are validated when you create and publish an event from the UI, or when you import content to a sourcing event from Microsoft Excel , or modify content using excel or UI. If the number of content items exceeds the specified limit, guided sourcing displays an error message.

Limits That Apply to All Events

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

Content Items	Limit for Standard and Simple-Capacity Guided Sourcing Events
Sum of all questions, requirements, and attachments Note There are no limits on the number of sections.	500
Terms per line item	Up to 80 for events that have up to 1000 line items. However, for events that have more than 1000 line items the recommended limit is 30 terms.
Suppliers	700 For more information, refer Inviting Participants for a Standard-Capacity Event.
Number of bid responses from suppliers	Recommended limit is 100 but it can be increased up to 250 for events that have up to 1000 line items.

Content Items	Limit for Standard and Simple-Capacity Guided Sourcing Events
Top-level items (including lots but does not include items inside lots) for competitive events	200
Top-level items (including lots but does not include items inside lots) for non-competitive events	2000
Maximum number of items per section	2000
Sum of all lots and line items (regardless of the type of lot or if line items are inside or outside lots)	200
Maximum total number of items and lots during open bidding for parallel competitive events	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.
Maximum number of items in item lots or bundle lots for serial and staggered competitive events	100

> ⓘ 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.

For more information, refer Specify the maximum number of suppliers allowed to participate in a competitive event and Specify the maximum number of suppliers allowed to participate in a non-competitive event.

Event Sizes and Reporting

The availability of an event for reporting can be determined by the event size. Events that exceed the following sizes are not sent for reporting until the Event Status is Pending Selection, Closed, or Cancelled. When does the reporting happens for eligible events

- 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.

Examples for Item and Lot Combinations

1. 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), where 1600 items = 20 item lots or bundle lots * 80 items.

- Not allowed for parallel competitive events. The maximum number of items and lots during open bidding in parallel competitive events should not exceed 200.
- Allowed in non-competitive events. Total number of items and lots is less than 2000.

2. Event with 19 lots, each with 105 line items:
   - 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 exceed 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).
3. Event with 5 item lots each with 40 items and 20 basket lots (with item pricing collection after bidding) each with 90 items:
   - 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 + 1800 items in basket lot = 2015.

Online Help for Guided Sourcing

Guided sourcing provides online, in-app help using SAP Companion, powered by SAP Enable Now.

When you're editing, monitoring, reviewing, or awarding a guided sourcing event, you can open SAP Companion, powered by SAP Enable Now. SAP Companion provides an in-app help panel with context-sensitive information. For guided sourcing, SAP Ariba provides preloaded help content. Sites with an SAP Enable Now license can also be configured to allow members of the **SAP Enable Now User** group to add custom SAP Companion content for guided sourcing.

SAP Companion also provides access to the learning center content, such as recommended tutorials related to the current user interface page.

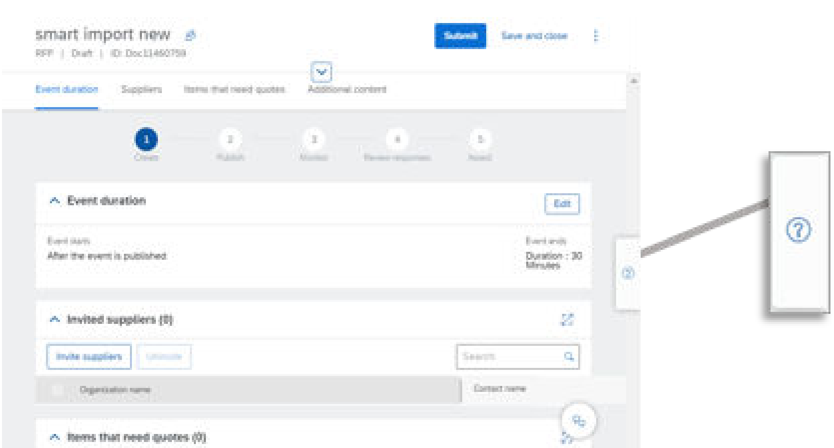
> Note
>
> Standard content is available to all organizations without an additional license. Custom content requires an SAP Enable Now license.

Prerequisites

Ensure that your web browser is configured to allow access to SAP Enable Now. For more information, refer to SAP Companion Integration Guide.

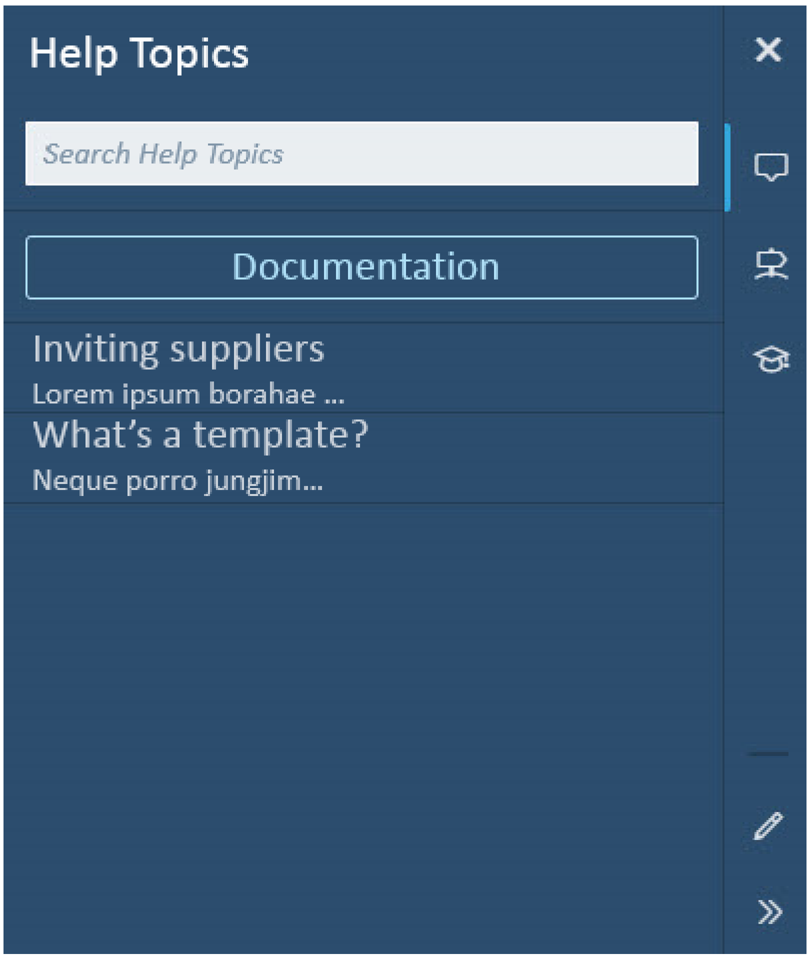
Opening SAP Companion Online Help

On user interface pages with online help available, you'll see a question mark icon ( ) on the right edge of the page. Click the question mark icon to open SAP Companion:



If the question mark icon is normally available but becomes unavailable based on your screen resolution and browser zoom values, navigate to the upper-right corner of the page, select the more options icon (•••), then select **Help**.

Using the SAP Companion Help Panel



In the SAP Companion help panel, you can perform the following actions:

To Perform This Action...	Select This Icon
Show the help topics for the current page	
Show the guided tours for the current page.	, then select the name of a guided tour to launch the tour
Access the Learning tab, which contains a list of the recommended learning topics for the current user interface page. You can also access the Learning Center, which contains additional process and task tutorials.	
Hide (minimize) the help panel (SAP Companion continues to run)	

To Perform This Action...	Select This Icon
Exit SAP Companion	
Customize online help (requires additional configuration)	

Customizing Online Help

In sites configured to allow custom SAP Companion content, members of the **SAP Enable Now User** group can customize online help by adding custom content and modifying the content layout, including the layout for standard (preloaded content). If you can customize online help for guided help, you'll see an edit icon () in the help panel.

For more information about how to set up and configure SAP Companion custom help, refer to Enabling SAP Companion Custom Content for Guided Sourcing.

Related Information

Enabling SAP Companion for Guided Sourcing
Enabling SAP Companion Custom Content for Guided Sourcing
SAP Companion Authoring Guide
SAP Companion Integration Guide

Guided Sourcing User Preferences

Your guided sourcing user preferences can determine the content you see in guided sourcing and default values.

To access guided sourcing user preferences: Click your name in the upper-right corner of the SAP Ariba Sourcing window, then select **Guided sourcing user preferences**.

Setting Default Supplier Search Filters for Guided Sourcing

Use this procedure to automatically populate the **Commodity**, **Region**, and **Department** filters in supplier searches with values from your event attributes.

Context

Some users' events include **Commodity**, **Region**, and **Department** attribute values. You can set default **Commodity**, **Region**, and **Department** supplier search filters based on the event's attribute values. You can accomplish this task from the **Guided sourcing user preferences** page or while you are working in an event.

> ⓘ Note
>
> Sites that do not use SAP Ariba Supplier Lifecycle and Performance automatically populate only **Commodities Supplied** values in your supplier searches.

Procedure

1. Click your name in the upper-right corner of the SAP Ariba Sourcing window, then select **Guided sourcing user preferences**.
2. In the **Guided sourcing user preferences** page, select the checkbox under **Edit default preferences**.

   You can access the **Guided sourcing user preferences** page from the user preferences dropdown in the upper-right corner of the page.
3. From the **Invite Supplier** page, while working in an event, select the **Get values from the event** checkbox.

   You can deselect the **Get values from the event** checkbox to remove your default filters, or you can manually remove filters.

Task overview: Guided Sourcing User Preferences [page 43]

Related Information

Managing Your Preferred Commodities for Guided Sourcing [page 44]

Managing Your Preferred Commodities for Guided Sourcing

Use this procedure to create and manage your list of preferred commodities for guided sourcing.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- A member of the **Customer Administrator** group has run the **CommodityPreferencesUpdateTask** task for your site.

Context

Your list of preferred commodities for guided sourcing determines the relevant content on your **For You** page. If you are configured as a SAP Ariba Contracts user, your preferred commodities affect the contracts shown in your **Expiring Contracts** tile. If your site uses SAP Ariba Category Management and you are a member of the **Category Buyer Opportunity Analysis** group, your preferred commodities determine which opportunities display in the **Opportunities** widget on the **For You** dashboard.

You can select commodities from a list of commodities populated from the events and projects for which you were a project team member in the last one year. You can delete commodities that you do not require in the preferred commodities list. You can also configure automatic updating of the list of preferred commodities when a new project is created or event is published with you as a project team member.

To create preferred commodities list and configure the settings:

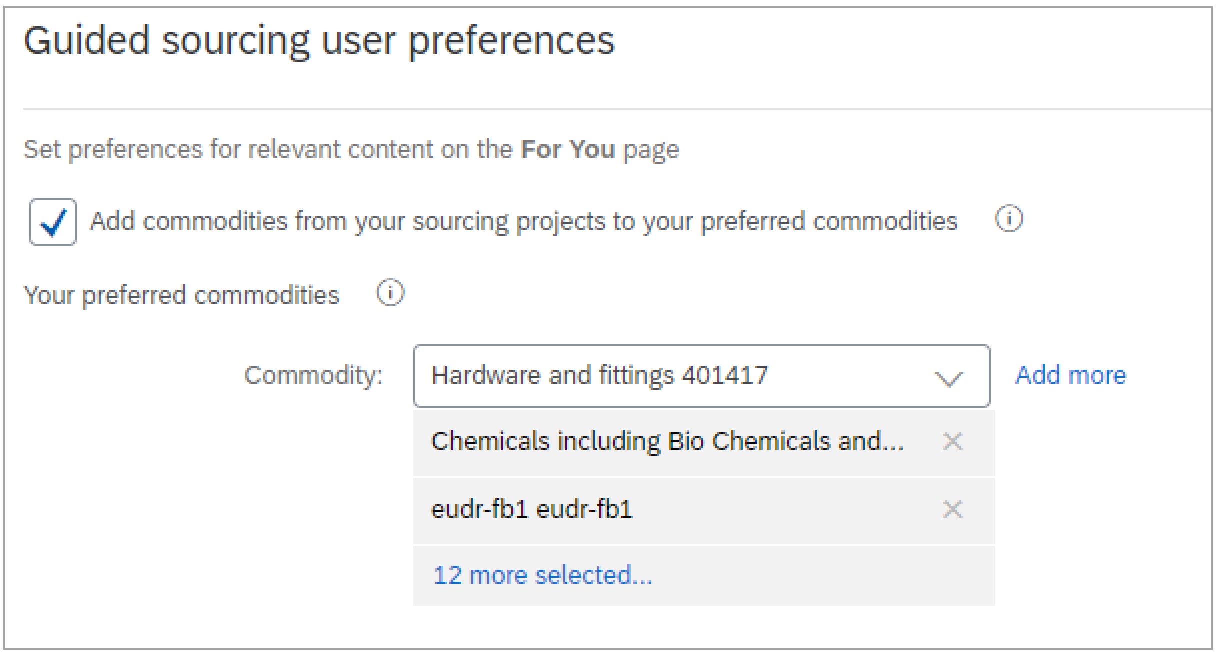
Procedure

1. Click your name in the upper-right corner of the SAP Ariba Sourcing window, then select **Guided sourcing user preferences**.

The **Guided sourcing user preferences** page opens with the following elements:

- Your preferred commodities dropdown list that displays the list of commodities from the previous events where you were a project owner.
- An **Add more** option that brings up a list of available commodities from which you can select commodities to add to the preferred commodities list.
- A hyperlink that states how many more commodities are in the preferred commodities list shown in the **Commodity** dropdown list.
- A checkbox **Add commodities from your sourcing projects to your preferred commodities** to enable regular updates of the list of commodities based on published events where you are a project owner.

For example:



2. From the **Your preferred commodities** section, review the commodities in the **Commodity** dropdown list, and choose one of the following options:
    - To add commodities that are not listed in the commodity dropdown, click **Add more** and select commodities.
        - To review the current list of preferred commodities, click the hyperlink that states how many more commodities are in the preferred commodity list for the user. Add or delete commodities to the list from the **Choose Values for Commodity** window and click **Done**.
    - To delete a commodity, click the **x** button next to it.
3. To ensure that **Your preferred commodities** section is updated whenever a new project is created or event is published with you as a project team member, select the **Add commodities from your sourcing projects to your preferred commodities** checkbox.
4. Click **OK** to save the changes.

Results

Note that any customizations you make to your list of preferred commodities are overwritten if the **CommodityPreferencesUpdateTask** task runs.

Task overview: Guided Sourcing User Preferences [page 43]

Related Information

Setting Default Supplier Search Filters for Guided Sourcing [page 43]
Viewing Expiring Contracts in Guided Sourcing [page 640]
Configuring Preferred Commodities for Guided Sourcing Users

Accessibility in Guided Sourcing

The guided sourcing interface of SAP Ariba Sourcing has accessibility features in the form of keyboard shortcuts to enable people with special needs to access content and perform various tasks.

These keyboard shortcuts are available through the event management process, that includes creating and editing events, reviewing responses, and awarding events.

The shortcuts are available for Windows and Macintosh systems.

Screen Readers

SAP Ariba supports the following screen reader programs:

- JAWS, from Freedom Scientific Inc.
- VoiceOver from Apple Inc.

> Note
>
> Other screen reader programs can work but aren't officially tested by SAP Ariba.

Pages

Accessibility features are available on the following pages in guided sourcing:

- **For You**
- **Create guided sourcing project**
- **Edit Event**
- **Monitor Event**
- **Invite Supplier**
- **Award Event**

Keyboard Shortcuts

The following table describes the keyboard shortcuts in guided sourcing:

Keyboard Shortcut	Purpose (As Applicable to a Guided Sourcing Event)	Additional Information
General shortcuts		

Keyboard Shortcut	Purpose (As Applicable to a Guided Sourcing Event)	Additional Information
`Tab`	To navigate to the next UI element on the page.	
`Shift` + `Tab`	To navigate to the previous UI element on the page.	
Shortcuts for hierarchical structures		
• **For Windows**: `F2` • **For Macintosh**: `F2`	To expand or collapse a hierarchical structure.	**Example** Let's suppose an event has a section **1.0 Section**, which has a subsection **1.1 Subsection** and another line item **1.2 Line Item**. The subsection **1.1 Subsection** has another line item **1.1.1 Line Item**. Navigate to **1.0 Section** by pressing `Tab`, then press `F2` to expand or collapse its hierarchical structure. Navigate to **1.1 Subsection** by pressing `Tab`, then press `F2` to expand or collapse its hierarchical structure. Navigate to **1.2 Line Item** by pressing `Tab`, then press `F2`. In this case, the hierarchical structure of **1.0 Section** is expanded or collapsed because **1.2 Line Item** doesn't have any subordinate elements.
Shortcuts for tables		
• **For Windows**: `Esc` • **For Macintosh**: `Control` + `Shift` + `Q`	To navigate out of a table structure to the next interactive UI element.	**Example** You want to navigate out of a table that contains multiple rows and columns.
• **For Windows**: `Ctrl` + `M` • **For Macintosh**: `Control` + `M`	To rearrange elements inside the items table and questions table of a sourcing event in draft state.	For more information, see Rearranging Table Entries in a Guided Sourcing Event Using Keyboard [page 52].

Keyboard Shortcut	Purpose (As Applicable to a Guided Sourcing Event)	Additional Information
`Tab`	To navigate between multiple interactive elements present in a table cell.	**Example** You're working on adding items to a draft event. After adding an item, 1. Press the `Tab` key to set the focus on a cell under the **Item** column. 2. Press the `Tab` key again to select the next interactive UI element in the cell, the item name. 3. Press the `Tab` key again to select the next interactive UI element, the item description, and so on.
Page level shortcuts		
• **For Windows**: `Ctrl` + `Shift` + `H` • **For Macintosh**: `Control` + `Shift` + `H`	To navigate from any point to the beginning of the page.	
• **For Windows**: `Ctrl` + `Shift` + `E` • **For Macintosh**: `Control` + `Shift` + `E`	To navigate from any point to the end of the page.	
• **For Windows**: `Ctrl` + `Shift` + `Right arrow` or `F6` • **For Macintosh**: `Control` + `Shift` + `Right arrow` or `F6`	To navigate to the next section on the page.	
• **For Windows**: `Ctrl` + `Shift` + `Left arrow` • **For Macintosh**: `Control` + `Shift` + `Left arrow`	To navigate to the previous section on the page.	
• **For Windows**: `Alt` + `T` • **For Macintosh**: `Control` + `Option` + `T`	To navigate from any section of the sourcing event to the first action button on the top-right corner of the event draft screen and execute the action. **Note** This shortcut works only when the guided sourcing event hasn't progressed beyond the **Review responses** stage.	**Example** Let's suppose you're working on a guided sourcing event that's currently in the **Create** stage. The focus is on the **Search** box in the **Tasks** section. If you press `Alt` + `T`, the control is redirected to the **Publish** button on the top-right corner of the page.

Keyboard Shortcut	Purpose (As Applicable to a Guided Sourcing Event)	Additional Information
• **For Windows**: `Alt` + `G` • **For Macintosh**: `Control` + `Option` + `G`	To navigate from any section of the sourcing event to its corresponding tab header.	**Example** Let's suppose you're working on a guided sourcing event and the focus is on the **Search** box in the **Tasks** section. If you press `Alt` + `G`, the control is redirected to the **Tasks** tab.
• **For Windows**: `Alt` + `L` • **For Macintosh**: `Control` + `Option` + `L`	Applicable only on the **For You** page. To navigate to the first feed card from anywhere on the page.	**Example** Let's suppose there are 20 feed cards on the **For You** page and the focus is currently on the 16th feed card. If you press `Alt` + `L`, the control is redirected to the first feed card on the page.
• **For Windows**: `Alt` + `Q` • **For Macintosh**: `Control` + `Option` + `Q`	Applicable only on the **For You** page. To navigate to the first option (**Create sourcing project**) under the **Quick links** section from anywhere on the page.	**Example** Let's suppose the focus is currently on a feed card further down the list on the **For You** page. If you press `Alt` + `Q`, the control is redirected to the first option (**Create sourcing project**) under the **Quick links** section.
• **For Windows**: `Alt` + `N` • **For Macintosh**: `Control` + `Option` + `N`	Applicable only on the **For You** page. To navigate to the tab header from anywhere on the page.	**Example** Let's suppose the focus is currently on a feed card further down the list on the **For You** page. If you press `Alt` + `N`, the control is redirected to the **For You** tab.
`Up arrow` / `Down arrow`	Applicable only on the **For You** page. To scroll through the feed cards on the page.	With focus on any UI element of a feed card, you can use the shortcut to scroll up or down the page. With focus on the **For You** tab, the `Down arrow` can be used to quickly navigate to the first interactive UI element on the page.
Shortcuts for conditions		

Keyboard Shortcut	Purpose (As Applicable to a Guided Sourcing Event)	Additional Information
• **For Windows**: `Ctrl` + `Shift` + `Q` • **For Macintosh**: `Control` + `Shift` + `Q`	To navigate out of the **Expression** section to the next available UI element on the **Create new condition** screen.	This shortcut is applicable on the popup that appears when you select the **Manage Conditions** option under the **Questions, requirements, and attachments** section, or the **Add Condition** option for a section, requirement, question, or an attachment.
`Esc`	To navigate from the **Create new condition** screen to **Manage Conditions** screen.	This shortcut is applicable on the popup that appears when you select the **Manage Conditions** option under the **Questions, requirements, and attachments** section, or the **Add Condition** option for a section, requirement, question, or an attachment.
Shortcuts for rich text fields		
• **For Windows**: `Ctrl` + `A` • **For Macintosh**: `Command` + `A`	To select the entire text in a rich text field.	
• **For Windows**: `Ctrl` + `I` • **For Macintosh**: `Command` + `I`	To italicize text in a rich text field.	
• **For Windows**: `Ctrl` + `B` • **For Macintosh**: `Command` + `B`	To make text bold in a rich text field.	
• **For Windows**: `Ctrl` + `U` • **For Macintosh**: `Command` + `U`	To underline text in a rich text field.	
Shortcuts for drop-down fields		
`Down arrow`	To open a dropdown list.	This shortcut can also be used to move down the list of options in the dropdown list.
`Up arrow`	To move up the list of options in the dropdown list.	
`Enter` or `Return`	To select an option in the dropdown list.	
`F2`	To access an expandable option in a dropdown list.	If a dropdown list contains options that contain suboptions and therefore can be expandable into a list of their own, you can use the `F2` key to expand the list and access the list of suboptions. Use the arrow keys to select the expandable option before pressing `F2`.

Rearranging Table Entries in a Guided Sourcing Event Using Keyboard

Use this procedure to rearrange table entries for items and questions in a guided sourcing event.

Prerequisites

- You're using a compatible screen reader program such as JAWS from Freedom Scientific Inc. or VoiceOver from Apple Inc.

  > Note
  >
  > Other screen reader programs might work but aren't officially tested by SAP Ariba.

- The guided sourcing project is in the **Draft** status.

Context

Users who rely on screen readers to perform tasks can use keyboard shortcuts to rearrange elements inside the items table and questions table of a guided sourcing event in draft state. The following steps describe the process from the items perspective, but can also be applied for questions.

Procedure

1. Open the draft sourcing event for editing.
2. Press `Tab` to navigate to the required item. Then press `Enter` to select the items to move.
3. Press `Ctrl` + `M`.

   For macintosh users, the keyboard shortcut is `control` + `M`.
4. On the resultant popup, press `Tab` to navigate to the dropdown for selecting the target position of the item. Then press `Enter` to get a list of the available options.
5. Using the arrow up/down keys, navigate to the required option and press `Enter` to make a selection.

   You can choose to move the selected items after, inside, or before another item in the list.
6. Select a reference item from the list. The items you want to move will be placed after, inside, or before this item. To select a reference item, you can,
   - Press `Tab` to navigate to the search field and enter the name of the reference item.
   - Press `Tab` to choose the reference item from the **All items** list. Then press `Enter` to make a selection.
7. Press `Tab` to navigate to the **Move** button. Then press `Enter` to move the selected items.

Results

The table entries are rearranged accordingly.

Accessibility Limitations in Guided Sourcing

Accessibility features in the guided sourcing interface of SAP Ariba Sourcing have the following limitations.

Serial number	Limitation
1	Pages in guided sourcing don't support a magnification of 400%. Therefore, when pages are zoomed to 400%, the content is not auto-wrapped and you must scroll (horizontally or vertically) to access content on the page.
2	Screen readers won't read out the cell position inside a table.
3	There are no keyboard shortcuts to manage the color palette on a rich text field.
4	Some pages such as **For You** and **Home** don't support a magnification of 200% because of UI element constraints.
5	While browsing through the list of options in the **Show/hide Columns** dropdown on the **Invite suppliers** page, options that aren't available are read out by the screen readers as "unavailable".
6	Pages in guided sourcing don't support a 2 px dashed border to focus on UI elements.
7	Screen readers read out the role of rich text editor fields as "textbox" instead of "RTE".
8	The Calendar UI element doesn't have a tooltip.
9	The tooltip of a UI element appears when you focus over it but doesn't disappear when you press the `Esc` key. The tooltip disappears only when you switch focus to another UI element.
10	Some HTML syntax errors arising out of third-party libraries referred to in UI elements are existing.
11	The `Tab` key can be used to navigate between Tabs (UI element) on pages such as **For You** and **Home**, but not the arrow keys.
12	The button to submit forms (For example, the **Publish** button on the draft page) is situated only at the top-right corner of the page.
13	If you change the locale setting in the application, you must sign out, clear your browser cache and then sign in again for the changes to take effect.
14	When you navigate to the company logo on the UI, the screen readers announce it as "Company Logo" verbatim instead of the actual name of the company.
15	While navigating through a data table, the column header names are announced twice by the screen readers.

Serial number	Limitation
16	When you navigate to a combo box UI element where you haven't selected any option, the screen readers regard the input field in a combo box element as a selectable option and announce it accordingly.
17	Data tables with freezed columns are not accessible.
18	The options on the rich text editor UI element are not completely accessible using keyboard shortcuts.
19	The screen readers announce the text area in the rich text editor as "textbox" instead of "rich text editor".
20	All the interactive UI elements are executed after the corresponding keyboard shortcut is released after a keypress.
21	When you navigate to a radio button UI element, sometimes the focus is set on the option that's not selected instead of the selected option.
22	All the graphical charts in a guided sourcing event are not completely accessible when the screen reading app is being used in the linear mode.
23	While using the arrow buttons to navigate between dates on the date/time widget, the button labels are not announced by the screen readers.

Finding Guided Sourcing Events in the Classic User Interface

Use this procedure to find guided sourcing events in the classic user interface.

Context

You can search for guided sourcing events in the classic user interface by navigating to the dashboard and opening the **Search** page.

Procedure

1. Open the search page for sourcing projects in the classic user interface.
2. Go to the **Sourcing** dashboard.
3. Click the **Search** icon ( ).
4. On the search page for sourcing projects in the classic user interface, click the button to add a field filter. You can also enter text in the search bar.
5. Click the field's pull-down arrow, and select **Origin**.
6. From the list of options, select **Guided Sourcing**.
7. Click **Search** and view the search results.

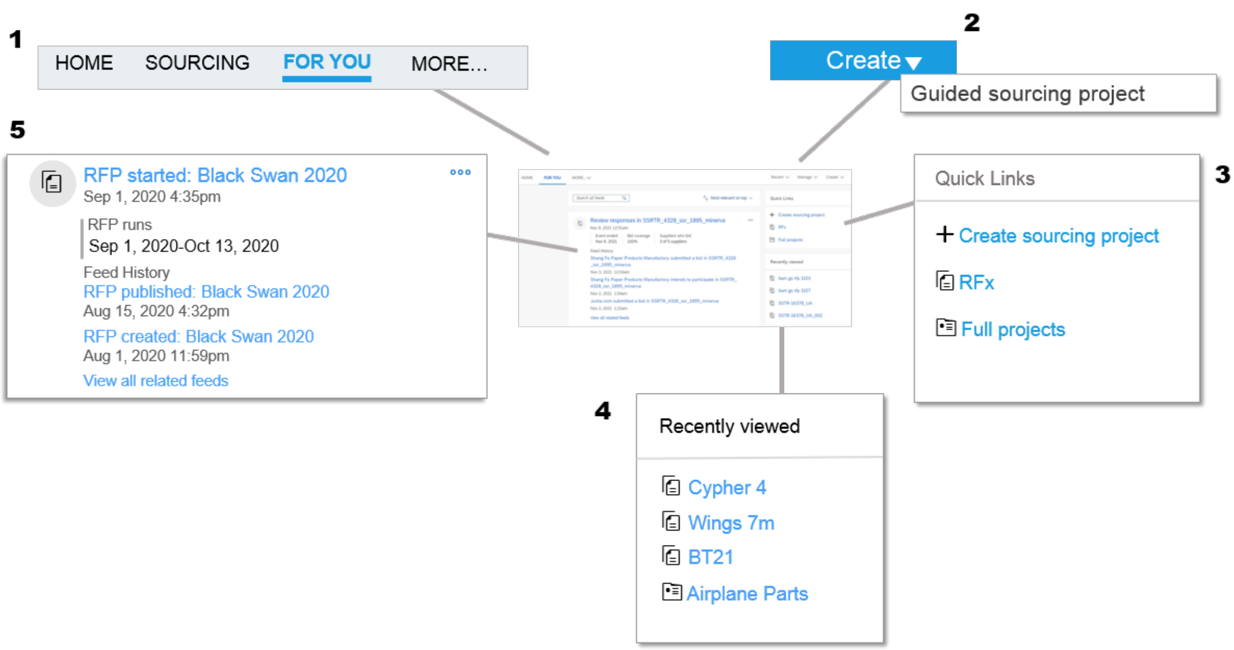
   For more information about searching in the classic user interface, see Searching, completing tasks, and other common user actions.

The For You Dashboard

From the **For You** dashboard, you can create and view guided sourcing full project or single-event project (event).

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

To open the **For You** dashboard, click **FOR YOU** on the solutions menu bar (item **1** in the following image).



The **For You** dashboard includes the following components:

1. Solutions menu bar.
2. **Create** menu. To create a guided sourcing full project or single-event project (event), select **Guided sourcing project**.
3. **Quick Links** panel.
    - Select **Create sourcing project** to create a guided sourcing full project or single-event project (event).
    - Choose **RFx** or **Full projects** to open a search page for events or full projects.
4. **Recently viewed** panel. Click an event name to open the event.
5. Feed cards for recent events that have occurred, such as:
    - A guided sourcing project was created or a guided sourcing event was created or published.
    - A supplier (participant) has submitted a response to state that they intend to or decline to participate in an event, or submitted a response with bids or other information.
    - The response time for a guided sourcing event has ended and the event changed status to the pending selection status.
    - An award was created for a guided sourcing event.

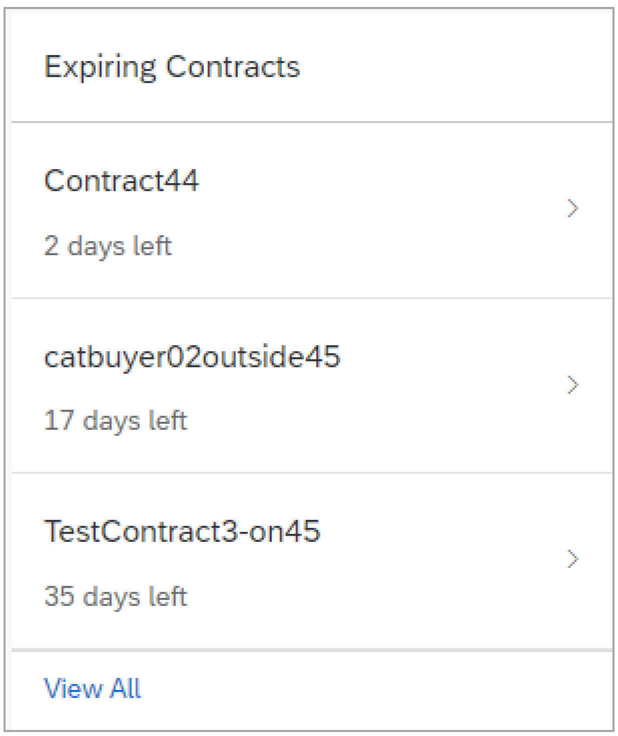
    From a feed card, you can:
    - Click an event or full project name to open it.

ⓘ Note

By default, full projects created in the classic user interface (classic full sourcing projects) open in the classic user interface. An administrator for your site can configure the parameter **Control how full sourcing projects are opened for Category Buyer users** so that classic full sourcing projects open in the guided sourcing user interface for **Category Buyer** users.

- Click **View all related feeds** to view all feed cards for the event.
- Click the name of an event approval task or full project name that is assigned to you to open the **Tasks** panel in the event. From the **Tasks** panel, you can approve or deny the task.
- To see recent changes, refresh your browser. There may be a delay of up to 5 minutes for feed cards to reflect new activity.
- Use the horizontal expand (>) or collapse (<) icon to expand or collapse the feed cards on the left side of the page or the navigation panels (such as **Quick links**, **Expiring contracts**, **Recently viewed**, **Watched projects**) on the right side of the page.

The **Expiring contracts** panel appears when you have set up your guided sourcing user preferences to display a list of contract workspaces with the most immediate expiration dates. For more information, see Viewing Expiring Contracts in Guided Sourcing [page 640].



The **Opportunities** widget displays SAP Ariba Category Management opportunities. You must be a member of the **Category Buyer Opportunity Analysis** group and have preferred commodities configued in your user preferrences for opportunities to appear. Only opportunities that you are responsible for are displayed, based on your preferred commodities. When you select an opportunity, a new browser tab is opened and you can view detailed information about the opportunity and take further actions (some actions may require specific permissions). For more information, refer to SAP Ariba Category Management Opportunities in Guided Sourcing [page 67].

The Guided Sourcing Feed [page 58]

Hiding and Showing Feed Items on the For You Page [page 60]

The Guided Sourcing Feed

The guided sourcing **For You** dashboard displays feed cards, which are notifications about key milestones, information, and tasks in a sourcing event.

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

You can use the guided sourcing feed to be guided to important incidents and tasks to act upon. Feed cards give you the latest information on recent events you are interested in.

Feed cards include notifications of the following:

- A sourcing event is created or has been published.
- Suppliers have bid, intend to participate, or decline to participate.
- An event is closing soon, is in pending selection state, or has been awarded.
- A message has been received.
- Tasks or approvals have been completed.

A **sort order** component in the live feed of the **For You** tab shows feeds based on relevance to each user.

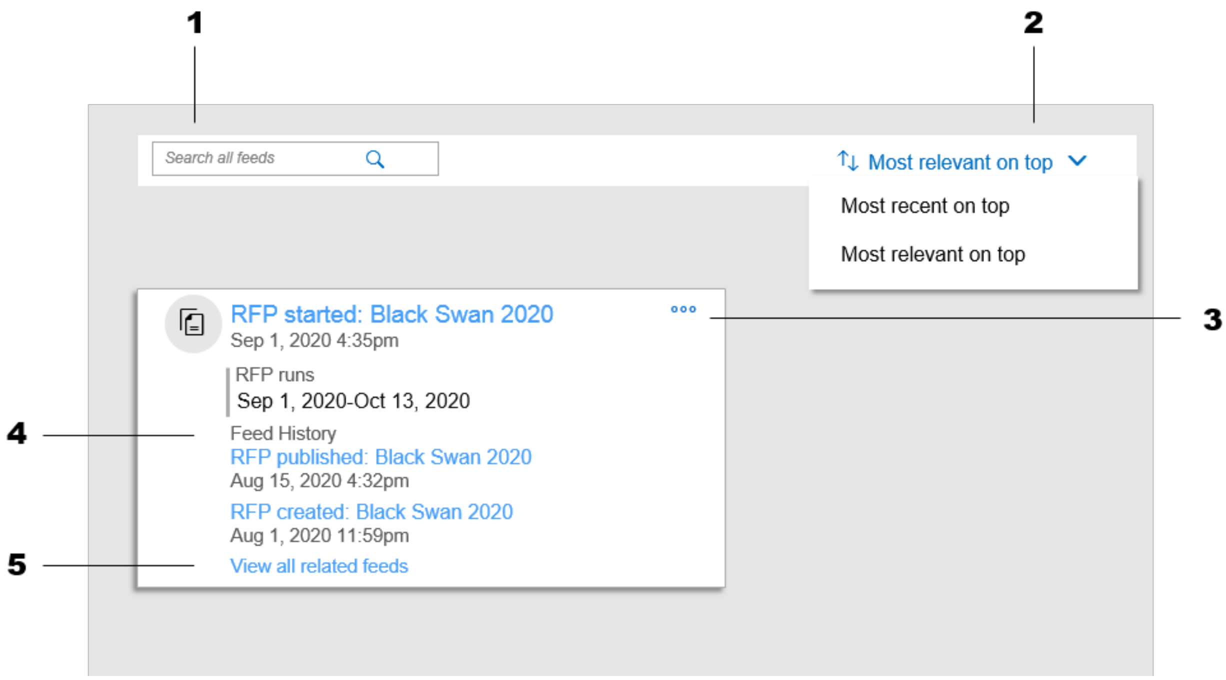
The feed is boosted according to the following sort orders:

- **Most recent on top**
- **Most relevant on top**

The relevance criteria is based on the following:

- Priority of the feed
- Date and time of the feed
- The user's last visit time to the **For You** dashboard
  Feed cards for approval tasks and supplier participation responses are of higher priority than feed cards for event awarded, event pending selection, event state change, event created, and event closing.
  Feed cards have links to all previous feeds for the same sourcing event. You can use the **View all related feeds** and **Feed History** links in a feed card to view additional feed cards for the same event. Clicking **View all related feeds** shows you all the feeds related to that event including the hidden feed cards. **Feed History** provides information about only the three most recent feed cards of the event. Clicking on the links under **Feed History** shows information and links to the three most recent feed cards for the same event.

The following image shows the location of feed elements in the dashboard:



1. Search bar where you can search for feeds.
2. Sort order component that shows feeds based on relevance.
3. **More** icon.
4. **Feed History** provides information about only the three most recent feed cards of the event.
5. **View all related feeds** shows all the feeds related to that event.

Example

Consider the following instances where you visit the **For You** dashboard:

Day 1

- You are assigned a task but don't complete it.
- You visit the **For You** feed.

Day 2

- You create an event.
- You visit the **For You** feed.

On day 2, when you visit the **For You** feed for the first time, the event appears at the top of the feed. When you visit the feed for the second time after creating the event, the task appears at the top of the feed.

Parent topic: The For You Dashboard [page 56]

Related Information

Hiding and Showing Feed Items on the For You Page [page 60]
Adding a For You Content Item to a Dashboard [page 64]
Finding Guided Sourcing Events in the For You Dashboard [page 65]
Finding Guided Sourcing Projects from the For You Dashboard [page 66]
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Hiding and Showing Feed Items on the For You Page

You can hide and show feed items, and sort and filter feeds based on their visibility status in both the Home and Search views on the **For You** page.

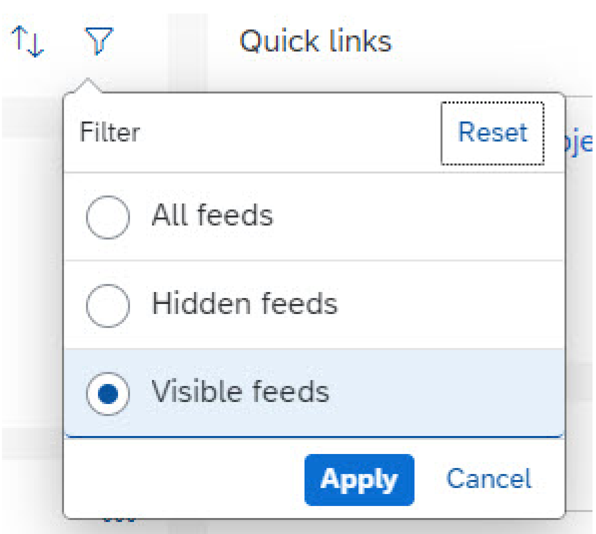
Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

Filtering Feeds by Visibility Status

You can filter ( ) feeds by visibility status:

- **All feeds**: Shows all hidden and visible feeds available to you.
- **Hidden feeds**: Shows feeds that you've hidden.
- **Visible feeds**: Shows the nonhidden feeds, which are selected by default on the **For You** page.

Click **Reset** to show the default, which is visible feeds only.

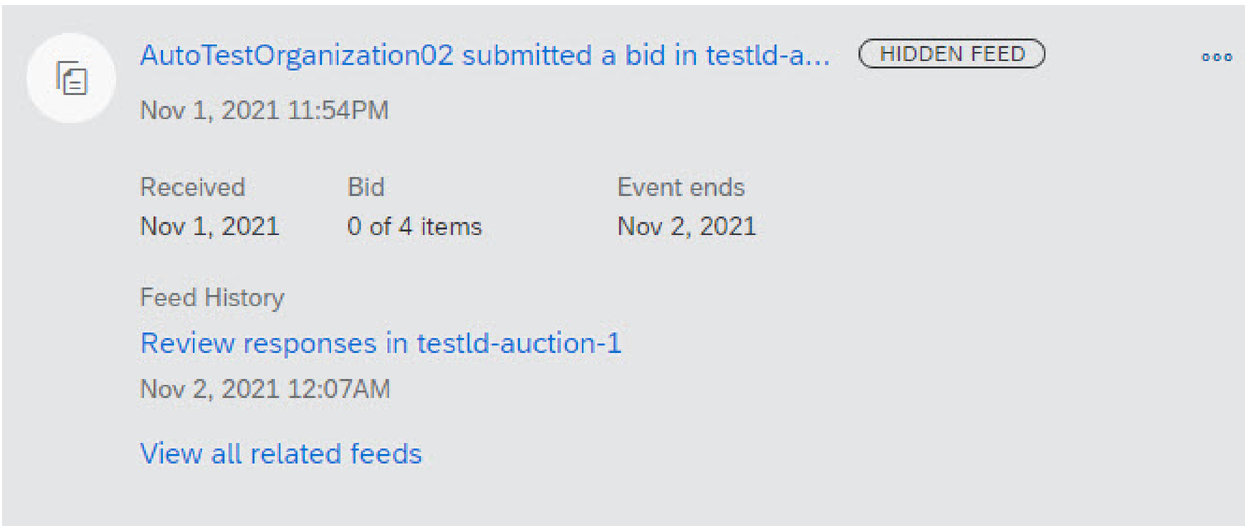


When you apply the **All feeds** or **Hidden feeds** filter:

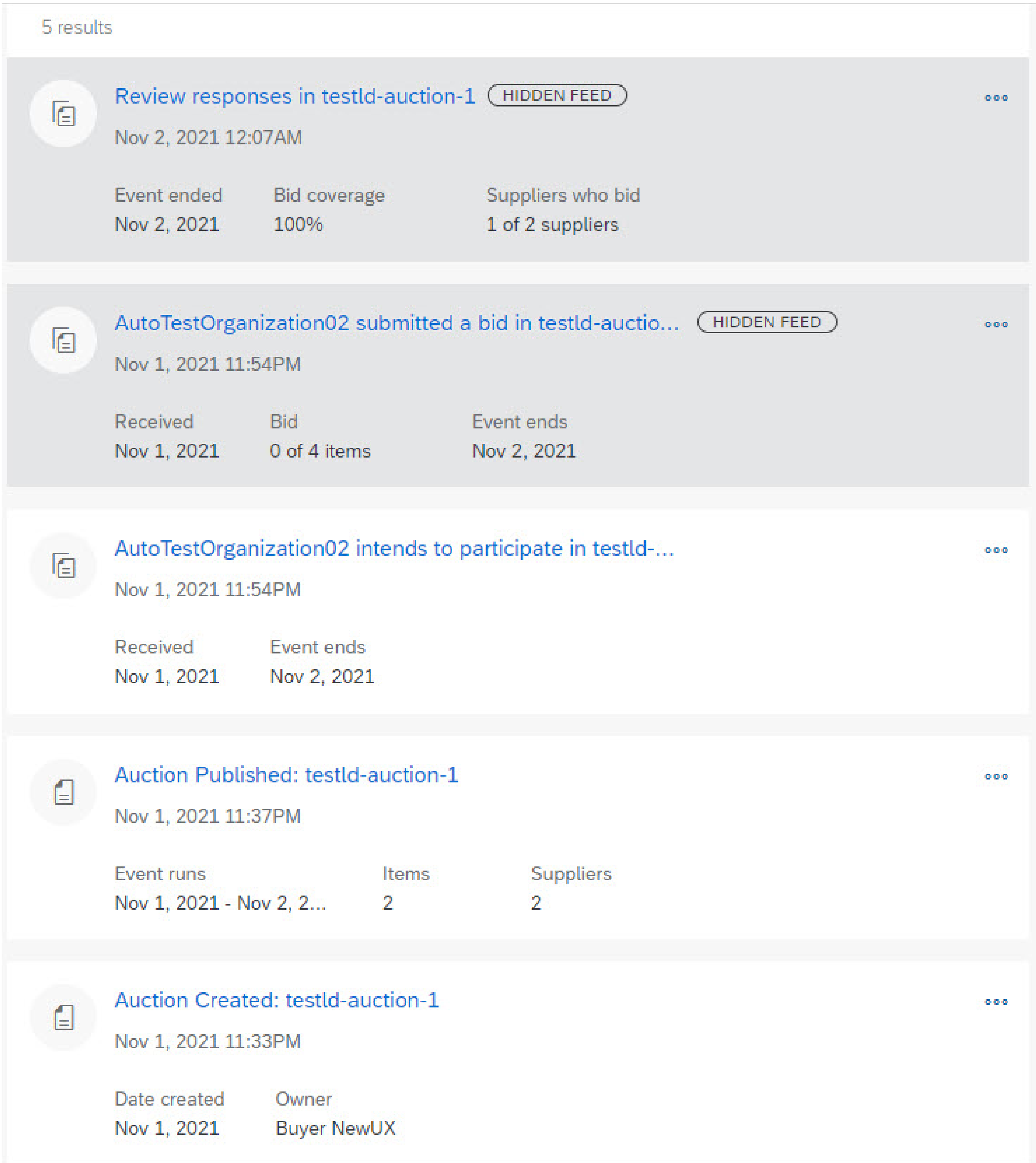
- The feed item is hidden only for you. It doesn't change the behavior for other users. When a feed card is hidden, only the card is hidden and not the event itself.
- The search bar contains, as placeholder text, **Search all feeds** or **Search all hidden feeds**. By default, when you don't apply any filters, only **Visible feeds** and **Search all visible feeds** appear.

For aggregated feeds, only the latest feed determines the visibility. If the latest feed is hidden, the feed card is hidden with all the relevant feeds inside it, including both visible and hidden feeds. Hidden feeds have a gray background and a 

label next to the feed title. Aggregated feed cards, whether hidden or visible, display a link to **View all related feeds**.



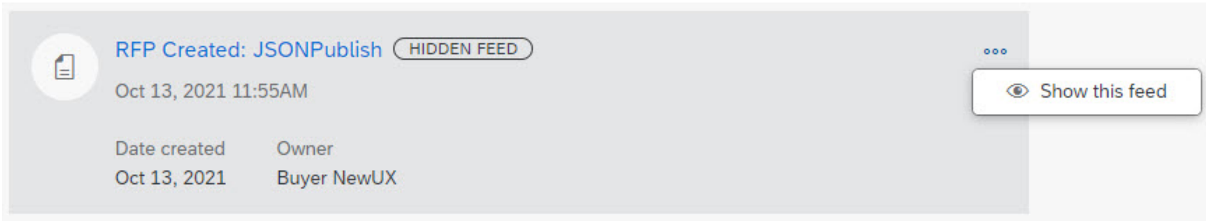
Click **View all related feeds** to display all the sourcing events and tasks related to the selected feed.



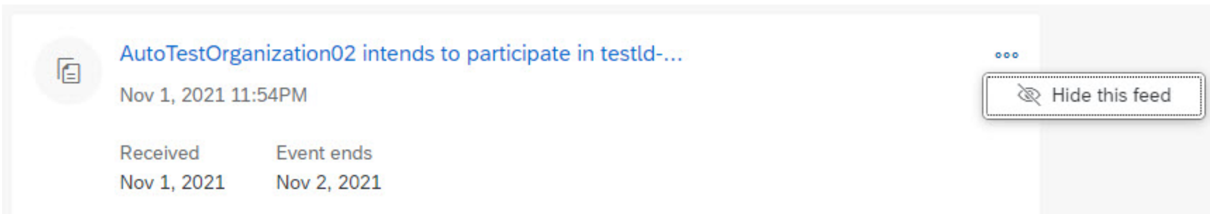
In the details of hidden feeds, only the topmost feed card is hidden. For a hidden aggregated feed card, with a **Feed History** section and a **View all related feeds** link, only the topmost feed event is hidden. Clicking the more icon (•••) to perform any hide/show action affects only that topmost feed.

When viewing all feeds, you can hide or show feeds by clicking the more icon (•••) and selecting the appropriate setting:

- To make a hidden feed visible, click the more icon (•••) and select **Show this feed**.



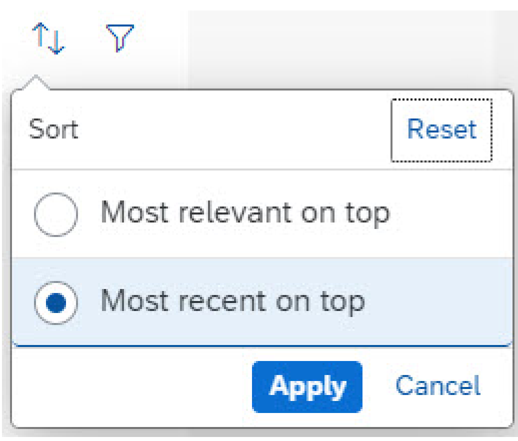
- To hide a visible feed, click the more icon (•••) and select **Hide this feed**.



Sorting Feeds by Relevance or Recency

The sort icon () lets you sort as follows:

- **Most relevant on top**: Sorts all the feeds related to your search.
- **Most recent on top**: Places the latest feeds at the top of your search results.



Parent topic: The For You Dashboard [page 56]

Related Information

The Guided Sourcing Feed [page 58]
Adding a For You Content Item to a Dashboard [page 64]
Finding Guided Sourcing Events in the For You Dashboard [page 65]
Finding Guided Sourcing Projects from the For You Dashboard [page 66]

SAP Ariba Category Management Opportunities in Guided Sourcing [page 67]
Feed Cards for Guided Sourcing Full Project Actions [page 68]
The Watched Projects Panel [page 70]

Adding a For You Content Item to a Dashboard

Use this procedure to add a **For You** content item to a dahsboard.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

Context

The **For You** content item can be added to any existing or user-created custom tab. You can access the three most recent feed items and search for all feed items in the **For You** content item.

Procedure

1. Open a dashboard, such as the **Sourcing** dashboard and click the tool icon () in the upper-right corner of the page.
2. From the dropdown, select **Add Content**.
3. Select **For You** and drag it to the dashboard.
4. Click **Done**.
   The three most recent events are displayed.
5. Go to an event of your choice and click **See Details**.
6. Click **See all activity feeds** to view all activity feeds on the **For You** tab.

Task overview: The For You Dashboard [page 56]

Related Information

The Guided Sourcing Feed [page 58]

Finding Guided Sourcing Events in the For You Dashboard

Use this procedure to find guided sourcing events in the **For You** dashboard.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

Context

You can search for guided sourcing events in the **For You** dashboard. It uses machine intelligence to find words that are similar to the words that you enter.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick Links** panel, click **RFx**.

   The **Guided sourcing projects** page opens.
3. You can search for events based on event name or ID by entering text in the search bar.
4. You can filter your results based on the following filters:
   - **Event state**
   - **Commodities**
   - **Regions**
   - **Departments**
5. To view the events for which you have **Project Owner** capabilities, click **Permissions**. From the dropdown, select **Projects I directly own** or **Projects I own or can manage**. You can also select **Projects I am a team member of** or **Projects I can view** based on your preference.

If you cannot find the event you're searching for, it might be a classic sourcing event. You can search for classic sourcing events by clicking **Search in all sourcing events**.

Task overview: The For You Dashboard [page 56]

Related Information

The Guided Sourcing Feed [page 58]
Hiding and Showing Feed Items on the For You Page [page 60]
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Finding Guided Sourcing Projects from the For You Dashboard

Use this procedure to find guided sourcing projects from the **For You** dashboard.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

Context

You can search for guided sourcing projects from the **For You** dashboard.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick Links** panel, click **Full projects**.

   The **Guided sourcing projects** page opens.

3. To search for projects based on project name or ID, enter text in the search bar.
4. You can filter your results based on the following filters:
    - **Project type**
    - **Commodities**
    - **Regions**
    - **Departments**
5. You can limit search results by the permission or role you have in a project by selecting one of the following permissions from the **Permissions** dropdown:
    - **Projects I can view**: All projects you can view, including projects for which you are a team member, projects you own or manage, or projects with no access control limits.
    - **Projects I own or can manage**: All projects for which you are the owner or for which you have Project Manager capabilities.
    - **Projects I directly own**: All projects for which you are the owner.
    - **Projects I am a team member of**: All projects for which you are a team member.
6. Click **Apply** and view the search results.

Task overview: The For You Dashboard [page 56]

Related Information

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SAP Ariba Category Management Opportunities in Guided Sourcing

Buyers who are using SAP Ariba Sourcing and SAP Ariba Category Management can view Category Management opportunities from the **For You** dashboard.

The guided sourcing **For You** dashboard includes the **Opportunities** widget. Users belonging to the **Category Buyer Opportunity Analysis** group can view SAP Ariba Category Management opportunities that they are responsible for. Opportunities are determined based on the user's preferred commodities. Your preferred commodities are configured on the **Guided sourcing user preferences** page.

When a user selects an opportunity from the **Opportunities** widget, it opens in a new browser tab. The user can then view detailed information about the opportunity and take further actions (some actions may require specific user roles).

You must meet the following prerequisites to use the **Opportunities** widget on the **For You** dashboard:

- You must be a member of the **Category Buyer Opportunity Analysis** group.
- For SAP Ariba Sourcing to communicate with SAP Ariba Category Management, users belonging to the **Customer Administrator** group must configure the following parameters in the **Intelligent Configuration Manager** workspace:
  - `Application.AQS.CatMan.Enabled`
  - `Application.AQS.CatMan.Hostname`
- Single sign-on (SSO) authentication must be configured in SAP Ariba Sourcing and SAP Cloud Identity Services – Identity Authentication service. Contact your Designated Support Contact (DSC) to enable it for your site.
- In SAP Ariba Category Management, purchasing categories must be mapped to the SAP Ariba Sourcing commodities.

Parent topic: The For You Dashboard [page 56]

Related Information

The Guided Sourcing Feed [page 58]
Hiding and Showing Feed Items on the For You Page [page 60]
Adding a For You Content Item to a Dashboard [page 64]
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Feed Cards for Guided Sourcing Full Project Actions

When you perform tasks in a full project, or when the status changes for to-do and approval tasks, the **For You** dashboard feed displays feed cards.

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

These feed cards appear in the feeds of project owners, team members, task owners, and approvers. For tasks, select the title of the feed card to open the task directly. The feed is only for Sourcing Projects and not for Sourcing Requests.

For event, task, and document feeds, the feed has a link that allows you to navigate to the full project from the **For You** page.

The following table shows the full project actions that appear in the dashboard feed cards:

Card name / action	Notes	Audience for each feed card
Full project **Created**	If the full project is created as **Planned**, the state is **Planned**. If it's created as **Active**, the state is **Active**.	Owner
Full project marked as **Active**	This card appears when the full project status is marked **On hold**, **Planned**, **Cancelled**, **Deleted**, or **Complete**.	Owner
Approval task	On the card, you have the option to approve or reject the task.	Approver
To Approve for Publish	On the card, you have the option to approve the task for the event to be published, or to reject it.	Approver
To Approve for Award	On the card, you have the option to approve the task for the event to be awarded, or to reject it.	Approver
To-Do (task is due soon)	On the card, you have the option to mark the task as **Complete** or **Started**.	Owner
To-Do (task is overdue)	On the card, you have the option to mark the task as **Complete**. Owners of the task can select **Complete Review** or **Set to complete**.	Owner
Team Grading task	On the card, you have the option to mark the task as **Complete**. Owners of the task can select **Complete Review** or **Set to complete**.	Owner/Reviewer
To Review for Team Grading	On the card, you have the option to mark the task as **Complete**. Owners of the task can select **Complete Review** or **Set to complete**.	Owner/Reviewer

Feeds appear for document actions when:

- A document is created inside a full project.
- A document inside a full project has been published.
- A document inside a full project is replaced.
- A document inside a full project is deleted.

Feeds appear for to-do tasks when:

- A to-do task is cancelled.
- A to-do task is deleted.
- A to-do task is **Set to started** for an inactive task.
- A to-do task is **Set to complete** for an active task.

Parent topic: The For You Dashboard [page 56]

Related Information

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The Watched Projects Panel

The guided sourcing **For You** dashboard includes a **Watched Projects** panel. This panel lists the four classic or guided sourcing projects you most recently watched and provides a **View All** link for you to view a full list of your watched projects.

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

If you are specifically interested in a classic or guided sourcing project, you can add it to your list of watched projects to easily access it from the **Watched Projects** panel. If you are no longer interested in this project, you can remove it from your list. For more information, refer to Adding or Removing a Sourcing Project from Watched Projects [page 71].

You can also make a classic or guided sourcing project automatically added to your list of watched projects by configuring watching criteria. For more information, refer to Making a Sourcing Project Automatically Added to Watched Projects [page 74].

Parent topic: The For You Dashboard [page 56]

Related Information

The Guided Sourcing Feed [page 58]
Hiding and Showing Feed Items on the For You Page [page 60]
Adding a For You Content Item to a Dashboard [page 64]
Finding Guided Sourcing Events in the For You Dashboard [page 65]
Finding Guided Sourcing Projects from the For You Dashboard [page 66]
SAP Ariba Category Management Opportunities in Guided Sourcing [page 67]
Feed Cards for Guided Sourcing Full Project Actions [page 68]

Adding or Removing a Sourcing Project from Watched Projects

The **For You** dashboard includes a **Watched Projects** panel. Use this procedure to add a classic or guided sourcing project that requires your attention to this panel to make the project easier to find and track. If you no longer pay attention to the project, you can remove it from the panel to stop watching it.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.
- 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

- The **Watched Projects** panel shows only the four latest watched projects. Clicking **View All** opens a full list of watched projects.
- When you access a classic sourcing project from the **Watched Projects** panel, you are redirected to the project page on the classic sourcing user interface.
- You have three ways to add or remove a sourcing project from your watched projects.

Adding or Removing a Sourcing Project on the Project Page

Use this procedure after opening a classic sourcing or guided sourcing project to add or remove it from your watched projects on the project page.

Procedure

1. Open a sourcing project.

   The project page appears.
2. Perform one of the following actions:
   - If you opened a guided sourcing full or single-event project, click the **More actions** icon (•••) in the upper-right corner of the project page.
   - If you opened a classic sourcing full project, click the **Actions** menu on the **Overview** tab.
   - If you opened a classic sourcing single-event project, ensure that it has been published, and click the **Actions** menu on the **Overview** tab.
3. Choose **Add to watched projects** to add the project to the **Watched Projects** list, or choose **Remove from Watched Projects** to remove the project from the **Watched Projects** list.

Adding or Removing a Sourcing Project on the Feed Panel

Use this procedure to add or remove only guided sourcing projects from your watched projects from the feed panel on the **For You** dashboard.

Procedure

1. Open the **For You** dashboard.
2. On the feed panel, find a feed card related to the project you'd like to add or remove.

   > ⓘ Note
   >
   > A feed card shows a key milestone or task in a guided sourcing project. Adding a milestone or task to your list of watched projects adds the corresponding guided sourcing project to the list.
3. Click the more icon (•••) on the feed card.
4. Choose **Add to watched projects** to add the project to the **Watched Projects** list, or choose **Remove from Watched Projects** to remove the project from the **Watched Projects** list.

Adding or Removing a Sourcing Project on the Watched Projects Panel

Use this procedure to add or remove both guided sourcing and classic sourcing projects from your watched projects on the **Watched Projects** page.

Procedure

1. Open the **For You** dashboard.
2. On the **Watched Projects** panel, click **View All**.

   The **Watched Projects** page opens.
3. Add or remove a sourcing project from your watched projects.
   - To add a project:
     1. In the upper-right corner of the page, click **Add projects**.
        The displayed page shows all the classic and guided sourcing projects you can add to your watched projects.
     2. Apply one or more search criteria and press **Enter** to search for the project you'd like to add, or go through the **Projects** list to find the project.
     3. Select the project and click **Add** in the upper-right corner.

        > Note
        >
        > You can also select multiple projects to add at a time.

        A **Success** dialog box appears, telling you that the project has been added to your watched projects.
     4. Click **View all** to view your list of watched projects, or click **Add more** to add more projects to your list.
   - To remove a project:
     1. In your list of watched projects, select the project you'd like to remove.

        > Note
        >
        > You can also select multiple projects to remove at a time.
     2. Click **Remove** in the upper-right corner above the list.
        A message is displayed, asking you whether to remove the project.
     3. Click **Remove**.

Making a Sourcing Project Automatically Added to Watched Projects

You can configure watching criteria so that any classic sourcing or guided sourcing project that matches your configured criteria can be automatically added to your watched projects on the **For You** dashboard.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.
- 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

The watching criteria refer to the following roles:

- **I am an Owner**: direct owner form the project header field.
- **I am a Team Member**: user added to a project team group.
- **I am an Approver**: user assigned to approve a project document in an approval task.
- **I am a Reviewer**: user assigned to review a project document in a review or negotiation task.
- **I am a Task Assignee**: user who is assigned a task.

You can select one or more of the roles. When you are added to a project as any of the selected roles, the project is automatically added to your watched projects.

If you remove an automatically added project, this project will not automatically appear in your list of watched projects anymore. If you want to watch it again, manually add it to your list.

Procedure

1. Open the **For You** dashboard.
2. On the **Watched Projects** panel, click **View All**.

   The **Watched Projects** page opens.
3. Click the setting button ( ) in the upper-right corner above the list of watched projects.
4. Select one or more roles and click **Apply**.

Guided Sourcing Project and Event Creation

Sourcing events are RFPs, RFIs, or auctions, which enable you to solicit pricing and other sourcing information from suppliers. All events (RFPs, RFIs, and auctions) are contained in a project, either a full project or a single-event project. (A single-event project is referred to as a "quick project" in classic sourcing).

When you create a guided sourcing project, you select the project type: full project or single-event project.

A **full project** can contain multiple events and supports all project management features, including phases, tasks, project documents, and project teams. Full projects can also contain multiple subprojects with events that share planning and savings tracking information. Full projects enable multiple users to work on the same documents or events with defined roles and processes, as well as tasks.

A **single-event project** can contain only one event with limited project management features. Single-event projects can contain documents only as items or attachments in the event. Single-event projects support project teams with no limitations. Single-event projects do not support phases and support only the following event-specific tasks:

- **Approval for Publish**
- **Approval for Award**
- **Review for Team Grading**
- **Approval for Team Grading**
- **Approval for Timing Change**

For information on content item limits for guided sourcing, refer About Content Item Limits for Guided Sourcing Events [page 37].

Many users typically refer to single-event projects simply as "events" because most of the project features are hidden. In the classic user interface, single-event projects are referred to as "quick projects."

Creating a Survey Event [page 128]

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event

Use this procedure to copy an existing guided sourcing project when creating a new one, which can simplify the project creation workflow. When you copy a project, you can choose whether to copy non-template content from the original project and also change project detail fields to match your needs.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- 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 single-event projects:
  - Your site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.
  - Users must be allowed to create single-event projects (known as **Quick Projects** in the classic SAP Ariba Sourcing user interface) independent of full sourcing projects. The site configuration parameter **Types of sourcing events that the project owner can create** (`Application.AQS.AllowableProjectType`) must not be set to 1 (Project owners can create only **Full Projects**).
    If the site configuration parameter **Types of sourcing events that the project owner can create** is set to 1, team members with the Project Owner, Active Team Member, or Limited Team Member roles can create a guided sourcing event inside a guided sourcing full project.
- To use insight tiles and reusable event template documents in a guided sourcing full project, you must have at least one **Full Project** template with these features configured. Refer to Configuring Insight Tiles for Guided Sourcing Full Projects and Configuring a Reusable Event Template Document in a Guided Sourcing Full Project for more information.

Context

You can create a new guided sourcing project by copying an existing project. The projects you can copy vary depending on the type of project you want to create:

- When copying a guided sourcing full project, you can choose from existing projects created in both the guided sourcing interface and the classic sourcing interface. If you copy a project created in the classic interface, the new project may not contain project insight tiles or reusable event template documents.
- When copying a guided sourcing single-event project (typically referred to simply as an event and known as a **Quick Project** in the classic interface), you can only choose from other guided sourcing single-event projects.

The system automatically copies the values of project header fields from the original project to the new project. These fields include **Commodity**, **Regions**, **Departments**, and others. When copying a guided sourcing full project, you can edit these field's values in the **Create guided sourcing project** page's **Project details** panel before finalizing project creation.

Procedure

1. If you're viewing the project you want to copy, select the **More actions** icon (•••) in the upper-right corner of the project and choose **Copy project** or **Copy event**.

   Skip to step 6.
2. If you aren't viewing the project you want to copy, go to the dashboard and select **Create** > **Guided Sourcing Project**.
3. Select **Preview projects to copy**.

   By default, the **Preview projects to copy** page shows recently created projects. You can also find specific projects by using the **Refine results** filters and the page's search box.

   The search box searches the following project fields:
   - **Name**
   - **Description**
   - **ID**
4. Choose a project to copy by completing one of the following actions:
   - Choose a project from the **Preview projects to copy** page by selecting the project card's **Copy** button.
   - Preview a project before copying it by selecting the project's name. While previewing a project, select **Copy** to copy it or select **Go back** to return to the search results.
5. Use the copy project popup's questions to choose the content you'd like to copy from the original project, then select **Done**.

   When copying a single-event project, use the checkboxes to choose the non-template content to include in the new project. You can choose from the following types:
   - Items that need quotes
   - Suppliers
   - Questions, requirements, and attachments
   - Team

When copying a full project, you can include either all of the non-template content from the original project or none of the non-template content.

- Choose **Yes** to copy all non-template content from the original project.

> ⓘ Note
>
> Non-template content for a full project may include a combination of the following categories:
>
> - Team members or groups
> - Tasks or phases
> - Documents, folders, events, or subprojects

- Choose **No** to only copy the content included in the original project's template.

6. On the **Create guided sourcing project** page, change any field values as needed for your project. For field descriptions, see Sourcing Project Fields.
7. Select **Create**.

Results

SAP Ariba creates a new guided sourcing project and navigates to one of the following pages:

- The single-event project's event page in edit mode
- The full project's main project page

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
Creating a Guided Sourcing Project from a Sourcing Request [page 87]
Creating a Guided Sourcing Event in a Full Project [page 89]
Creating RFP Events Using the Smart Import from Excel Feature [page 91]
Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing [page 100]
Creating Bid Transformation Events in Guided Sourcing [page 104]
About Creating Total Cost Auctions and RFPs [page 107]
Creating an English Reverse Auction Event in Guided Sourcing [page 109]
Creating Dutch Reverse Auctions for Guided Sourcing [page 113]
Creating a Japanese Reverse Auction in Guided Sourcing [page 117]
Creating Dutch Forward Auctions for Guided Sourcing [page 121]
Creating an English Forward Auction in Guided Sourcing [page 124]
Creating a Survey Event [page 128]
Guided Sourcing Event Types [page 31]

Creating a Guided Sourcing Project or Event from a Template

Use this procedure to create a guided sourcing project or event from a template. When you create a guided sourcing project from a template, your new project contains only pre-defined content inherited from the template. After you create the project, you can edit and add content as required for your use case.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- 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 single-event projects:
  - Your site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.
  - Users must be allowed to create single-event projects (known as **Quick Projects** in the classic SAP Ariba Sourcing user interface) independent of full sourcing projects. The site configuration parameter **Types of sourcing events that the project owner can create** (`Application.AQS.AllowableProjectType`) must not be set to 1 (Project owners can create only **Full Projects**).
    If the site configuration parameter **Types of sourcing events that the project owner can create** is set to 1, team members with the Project Owner, Active Team Member, or Limited Team Member roles can create a guided sourcing event inside a guided sourcing full project.
- To use insight tiles and reusable event template documents in a guided sourcing full project, you must have at least one **Full Project** template with these features configured. Refer to Configuring Insight Tiles for Guided Sourcing Full Projects and Configuring a Reusable Event Template Document in a Guided Sourcing Full Project for more information.

Context

A template provides the initial specifications for your project. Using a template with pre-defined content is one common way of standardizing business practices. Some typical uses for templated content include:

- Having a single-event project template specify what information to collect from supplier participants, such as price quotes or shipping information
- Having a full project template define project steps with tasks and phases and generate project materials, such as files, events, or other documents

Refer to the Project Template Guide for more on project template capabilities.

You can also create a project by copying an existing project [page 77].

Procedure

1. From the dashboard, select **Create** > **Guided Sourcing Project**.
2. Enter a name and description for the project.

   > ⓘ Note
   >
   > The project's name can't contain the following special characters: `\ / : ? " < > | # + % &`

3. Choose a value for **Test project**.

   > ⓘ Note
   >
   > After you create a guided sourcing single-event project, you can change the **Test project** field's value while the event's state is **Draft**. After you schedule or publish an event, only team members with the **Event Administrator** role can edit the field.
   >
   > After you create a guided sourcing full project, you can't edit the **Test project** field's value.

4. Choose a project type.

   A **Single event** project contains one sourcing event, while a **Full project** can contain multiple events, subprojects, and other documents. A full project also provides project and workflow management components, including tasks, phases, and folders.

   Depending on the type you choose, complete one of the following actions as well:

   - For a single-event project, choose an event type. Refer to SAP Ariba Sourcing Event Types for descriptions of SAP Ariba Sourcing event types.
   - For a full project, choose a 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**.

5. **Optional:** Fill out additional project fields as necessary. For descriptions of standard project fields, see Sourcing Project Fields.
6. Choose a template and complete any template questions that appear.

> ⓘ Note
>
> Certain project field values may control which templates you can use to create projects or what content a project contains. If a specific template doesn't appear for you, ask your company's template creator for help.

7. **Optional:** Choose a value for **External System** and complete any additional fields that appear.

   The **External System** field is visible only if your site is integrated with multiple external systems. It specifies the 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 event contents.

   If your site is integrated with only one external system, this field isn't visible and the project is automatically integrated with that system.

   Additional fields in this panel can include standard external system fields or custom fields configured by your organization.
8. Select **Create**.

Results

SAP Ariba creates a new guided sourcing project and navigates to one of the following pages:

- The single-event project's event page in edit mode
- The full project's main project page

> ⓘ Note
>
> You can view and access the project template from the guided sourcing project anytime. For more information, see Viewing and Accessing the Project Template from a Guided Sourcing Project [page 83].

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
Creating a Guided Sourcing Project from a Sourcing Request [page 87]
Creating a Guided Sourcing Event in a Full Project [page 89]
Creating RFP Events Using the Smart Import from Excel Feature [page 91]
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Creating a Japanese Reverse Auction in Guided Sourcing [page 117]
Creating Dutch Forward Auctions for Guided Sourcing [page 121]
Creating an English Forward Auction in Guided Sourcing [page 124]
Creating a Survey Event [page 128]
Guided Sourcing Event Types [page 31]
Show Event Description field to participants

Viewing and Accessing the Project Template from a Guided Sourcing Project

Buyers can use this procedure to view and access the project template from a guided sourcing project to review the settings and configurations that are applicable to the sourcing project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be:
    - A member of the **Template Creator** group.
    - A part of the team member group that can edit the template.

Context

Guided sourcing projects provide information about the templates that they're based on. Buyers can view or access the template from a sourcing project as necessary.

From single-event projects, buyers can access the corresponding document in the selected project template, but from full projects, they can access the template workspace.

> ⓘ Note
>
> If there are multiple versions of the document/template workspace, buyers get access to the version that was used to create the respective project.

Procedure

1. Open a guided sourcing project from the **Home** page.
2. Depending on the project you've selected, you can identify the template as follows:

- For single-event projects, the **Template** field is a part of the **Event Information** section and is accessible by clicking the ⌄ *(Click or press enter to show event information)* button. It shows the name of the corresponding document in the project template.

  > **Note**
  >
  > The document name can be different from the name of the project template.
  >
  > > **Example**
  > >
  > > Suppose you've created a single-event project by selecting a template **Template A**. This template has a document **Document B** that's applicable to the event. Then **Document B** is shown in the **Template** field and not **Template A**.

- For full projects, the **Template** field is a part of the **Project Summary** section. It shows the name of the template workspace.

> **Note**
>
> - The **Template** field value isn't editable.
> - You can view the template name as plain text if you are an active team member of the project. You can see the template name as a link only if you are a part of the **Template Editor** group. You cannot see the template name or link if you are not part of the **Template Editor** group.

3. Click the template name to access the template.

   Single-event projects (including events created in full projects) display the name of the corresponding document in the selected template workspace.

   Full projects display the name of the selected template's workspace.
4. Review the template details as necessary.

   Any changes made to the template won't be applicable to the current sourcing project. The changes will apply to new projects only after the template is published.
5. To return to the project workspace, click the ‹ *(Back)* button at the top-left corner of the page.

> **Note**
>
> If you've navigated to multiple areas within the template, you may not be able to return to the project workspace by clicking the ‹ *(Back)* button. In that case, you can return to the home page and reopen the sourcing project.

Creating a Sourcing Request in Guided Sourcing from the For You Dashboard

Use this procedure to create guided sourcing requests from the dashboard. This ability is available to all users, regardless of their group memberships.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to access the **For You** dashboard.

Context

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.

Procedure

1. From the **For You** dashboard, select **Create** > **Guided Sourcing Request**.

   Alternatively, you can select the **Create sourcing request** quick link from the **For You** dashboard.
2. Enter a **Name** for the sourcing request.
3. Select a **Template** to use for the sourcing request.
4. Click **Create**.

   The guided sourcing request is created and is set to the **Active** state.
5. View and submit the tasks under the **Tasks** tab. 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.
6. (Optional) By default, the sourcing request contains a **Sourcing Request Items** document that can store event information (rules, team, suppliers, and content). Information in the **Sourcing Request Items** document is propagated to the event or project created from this request. You can edit the **Sourcing Request Items** document.
   a. Under the **Events and other documents** tab, click the **Sourcing Request Items** document.

      The **Create sourcing request** page opens.

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

   The **Sourcing Request Items** document opens.

c. Under the **Suppliers** tab, select **Invite suppliers** to add suppliers to the **Sourcing Request Items** document.

   > ⓘ Note
   >
   > The **Invite suppliers** and **Uninvite** buttons do not appear when the parameter `Application.AQS.DisableSupplierInvitationInSourcingRequests` is set to **Yes**.

d. Under the **Items that need quotes** tab, select **Add** > **Item** to add items to the **Sourcing Request Items** document.

   You can click **See all options** at the bottom of the **Add item** pop-up window to open the full **Add item** page.

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Guided Sourcing Project from a Sourcing Request [page 87]
Creating a Guided Sourcing Event in a Full Project [page 89]
Creating RFP Events Using the Smart Import from Excel Feature [page 91]
Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing [page 100]
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Creating an English Forward Auction in Guided Sourcing [page 124]
Creating a Survey Event [page 128]

Creating a Guided Sourcing Project from a Sourcing Request

Use this procedure to create a sourcing project from a sourcing request in guided sourcing, then add items from the sourcing request to events in the sourcing project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must also 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

By default, a sourcing request contains the following items:

- A sourcing project as a subproject of the sourcing request. This subproject acts as a placeholder that can be opened to create a sourcing project from the request. By default, the subproject is not visible until the request is approved.
- A **Sourcing Request Items** content document. This a special mapping document that contains information about an event, such as event rules, content (including line items from an ERP `QuoteRequest` document), and participants. If a sourcing project is created from the request, information in this document is automatically copied to the new sourcing project. By default, the content document is at the top-level of the request's document structure (it's not in a folder) and it must remain at the top-level for the information to be automatically copied.
- The following tasks:
  - Send Notifications for New Sourcing Request
    This task sends a notification to the Sourcing Manager group when the request is created.

- Prepare Sourcing Request
  This is a required to do task. You can add text in the **Description** field with instructions for the sourcing manager to modify the header level fields like Region, Department, or Commodity Code if needed.
- Approval for Sourcing Request
  This is an approval task. By default, the approval flow is empty, so the task is automatically approved when it is submitted. When this task is approved, the **IsApproved** condition becomes true and the subproject (sourcing project) becomes visible below the **Documents** tab.

Procedure

1. In guided sourcing, open a sourcing request.

   To find a sourcing request in guided sourcing:

   a. Go to the **For You** page.
   b. In the **Summary** panel, open the **Events** tab and choose **Open events**.

      A search page opens.
   c. In the left panel, choose the **Sourcing request** search filter for the **Project type**. Click **Apply**.
   d. In the search results, click the name of your sourcing request to open it.
2. In the **Tasks** panel of the sourcing request, submit and complete tasks as needed.

   By default, the tasks in a sourcing request include an **Approval for Sourcing Request** task. When this task is completed, the subproject (sourcing project) becomes visible in the **Events and other documents** panel.
3. Open the sourcing project by clicking the project name.
4. Complete fields in the **Create guided sourcing project** page and select a template. Click **Create**.

   If you select a full project 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 you select a full project template that contains no event or multiple events, create or open an event. Add items from the sourcing request to the event (the **Sourcing Request Items** document):

   a. Go to the **Items that need quotes** panel.
   b. Choose **Add** > **Items from sourcing request** .

      Alternatively, you can use the **More actions** icon (•••) on an item in an event section and choose **Items from sourcing request**.
   c. In the **Select items** panel, complete one of the following actions:
      - Click **Add all content** to add all items from the sourcing request.
      - Check the items you want to add and click **Select**.
   d. **Optional:** In the **Questions, requirements, and attachments** area of an event, use the **More actions** icon (•••) on a line of content and choose **Content from sourcing request**.

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
Creating a Guided Sourcing Event in a Full Project [page 89]
Creating RFP Events Using the Smart Import from Excel Feature [page 91]
Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing [page 100]
Creating Bid Transformation Events in Guided Sourcing [page 104]
About Creating Total Cost Auctions and RFPs [page 107]
Creating an English Reverse Auction Event in Guided Sourcing [page 109]
Creating Dutch Reverse Auctions for Guided Sourcing [page 113]
Creating a Japanese Reverse Auction in Guided Sourcing [page 117]
Creating Dutch Forward Auctions for Guided Sourcing [page 121]
Creating an English Forward Auction in Guided Sourcing [page 124]
Creating a Survey Event [page 128]
About RFQ and Award Integration with SAP Ariba Sourcing

Creating a Guided Sourcing Event in a Full Project

This procedure demonstrates how to use the events your project inherits from the project template to complete your sourcing process, or add additional, non-template events from the **Events and other documents** panel's **Create** menu.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- To create an event using the **Events and other documents** panel's **Create** menu, your project template must contain at least one reusable event template document and you must meet one of the following requirements:
  - You're the project owner.
  - You have project owner capabilities for the project.
- To create an event inherited from the project template, you must meet one of the following requirements:
  - You're the project owner.
  - You have project owner capabilities for the project.

Context

Typically, the template you select when you create a project automatically adds the appropriate events for your project's workflow to the **Events and other documents** table. You then create, edit, publish, and award these events as the project progresses.

If your project template has event template documents configured for reuse, you can also add additional events to your project from the **Events and other documents** panel's **Create** menu. All sourcing events created from the **Create** menu use the guided sourcing interface.

For more on working with sourcing events, refer to the Event Management Guide and Managing Events with Guided Sourcing [page 12].

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** panel, complete one of the following actions:
   - To add a new event to the project, select **Create** > **Document**, then choose **Sourcing event**.

     > Note
     >
     > When adding a new event to a guided sourcing project, you choose a template at the time of creation. You can choose from any guided sourcing event templates specified for reuse in the project template.

   - To create an event inherited from the project template, select the event's name in the **Events and other documents** table.

     > Note
     >
     > When creating an event inherited from the project template, you don't choose a template for the event.
3. If you're adding a new event to the project, follow the procedure in Creating a Guided Sourcing Project or Event from a Template [page 80] to create your event.

   If you're creating an event inherited from the project template, follow the procedure in Creating a Guided Sourcing Project or Event from a Template [page 80] for a guided sourcing event or the procedure in Creating Sourcing Events Without a Sourcing Request for an event that uses the classic SAP Ariba Sourcing interface.

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
Creating a Guided Sourcing Project from a Sourcing Request [page 87]

Creating RFP Events Using the Smart Import from Excel Feature

Use the smart import feature to create an RFP from an Excel file that contains content in your preferred format. SAP Ariba generates event content from your file by matching its contents with the correct SAP Ariba Sourcing event content types. You can use this procedure to add content using smart import when you create a guided sourcing event or while editing a draft event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- 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 single-event projects:
  - Your site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.

- Users must be allowed to create single-event projects (known as **Quick Projects** in the classic SAP Ariba Sourcing user interface) independent of full sourcing projects. The site configuration parameter **Types of sourcing events that the project owner can create** (`Application.AQS.AllowableProjectType`) must not be set to 1 (Project owners can create only **Full Projects**).
  If the site configuration parameter **Types of sourcing events that the project owner can create** is set to 1, team members with the Project Owner, Active Team Member, or Limited Team Member roles can create a guided sourcing event inside a guided sourcing full project.
- The Smart import from Excel for guided sourcing events [page 676] 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**
- 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

The smart import feature enables you to upload an Excel file with RFP information in your preferred format. SAP Ariba uses machine intelligence to determine which entries are line items. SAP Ariba also maps Excel column entries to line item fields (such as the item **Name**) and terms (such as **Quantity**).

> ⓘ Note
>
> - To resolve the issue of having too many columns in the spreadsheet, which exceeds the maximum limit of the 30 terms for pricing items, you can either delete columns using the 'Delete' option in the column menu or remove some columns from the spreadsheet and upload it again.
> - This topic describes the procedure for importing content while creating a guided sourcing single-event project. Alternatively, you can open a draft event, select the *More actions* icon (…), and then choose **Import content from Excel**. In the **Choose import method and upload file** popup, choose **My own format (use smart import)** then select **Next**.
>   The **Import content to your event from a spreadsheet** page appears. If you're importing content to an existing event, skip steps 1 through 9, and go to Step 10.
>
>   > ⚠ Caution
>   >
>   > If you import content to an event, any existing content in the event is overwritten with the new content and is lost.

Procedure

1. From the dashboard, select **Create** > **Guided Sourcing Project**.
2. Enter a name and description for the project.

   > ⓘ Note
   >
   > The project's name can't contain the following special characters: \ / : ? “ < > | # + % &

3. Choose a value for **Test project**.

   > ⓘ Note
   >
   > After you create a guided sourcing single-event project, you can change the **Test project** field's value while the event's state is **Draft**. After you schedule or publish an event, only team members with the **Event Administrator** role can edit the field.
   >
   > After you create a guided sourcing full project, you can't edit the **Test project** field's value.

4. For **Project type**, choose **Single event**.
5. In the **Smart import (optional)** panel's **Upload spreadsheet for smart import** area, select **browse** and locate the `.xls` or `.xlsx` file that contains the unstructured data for your project. Alternatively, you can drag the file onto the upload area.

   > ⓘ Note
   >
   > To download sample Excel files, select **To get started, you can download example spreadsheets** and choose one of the example spreadsheets. You can choose from the following sample types:
   >
   > - Single sheet pricing items
   > - Multiple sheets with items, questions, and requirements
   > - Material master sample
   >
   > These sample spreadsheets are for reference purpose only and aren't meant for enforcing any particular structure or format.

6. **Optional:** Fill out additional project fields as necessary. For descriptions of standard project fields, see Sourcing Project Fields.
7. Choose a template and complete any template questions that appear.

   > ⓘ Note
   >
   > Certain project field values may control which templates you can use to create projects or what content a project contains. If a specific template doesn't appear for you, ask your company's template creator for help.

8. **Optional:** Choose a value for **External System** and complete any additional fields that appear.

   The **External System** field is visible only if your site is integrated with multiple external systems. It specifies the 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 event contents.

   If your site is integrated with only one external system, this field isn't visible and the project is automatically integrated with that system.

Additional fields in this panel can include standard external system fields or custom fields configured by your organization.

9. Select **Create**.

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

10. Review the sheet mappings in the **Manage worksheets** popup, then select **Confirm**. For information about reviewing the sheet mappings, see Managing Sheet Mappings [page 95].

    > ⓘ Note
    >
    > You can map more than one sheet to the same content type. If you import multiple sheets of the same content type, the content from each sheet is shown in a separate section.

11. **Optional:** On the **Import content to your event from a spreadsheet** page, select **Preview items** to review any item-level mappings and make modifications. For information about reviewing item-level mappings, see Reviewing Item-Level Mappings [page 97].

12. **Optional:** Select **Preview questions** to review the mappings for any questions and make modifications.

    For more information about reviewing questions, see Reviewing Mappings for Questions [page 100].

13. **Optional:** Select **Preview requirements** to review any requirements.
    a. Select 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.

14. After you review the content, select **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 Administrato**r).

    SAP Ariba adds the items and content shown in the preview table to the event.

Next Steps

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

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]

Creating a Guided Sourcing Project from a Sourcing Request [page 87]
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Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing [page 100]
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Creating an English Forward Auction in Guided Sourcing [page 124]
Creating a Survey Event [page 128]
Guided Sourcing Event Types [page 31]

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**.

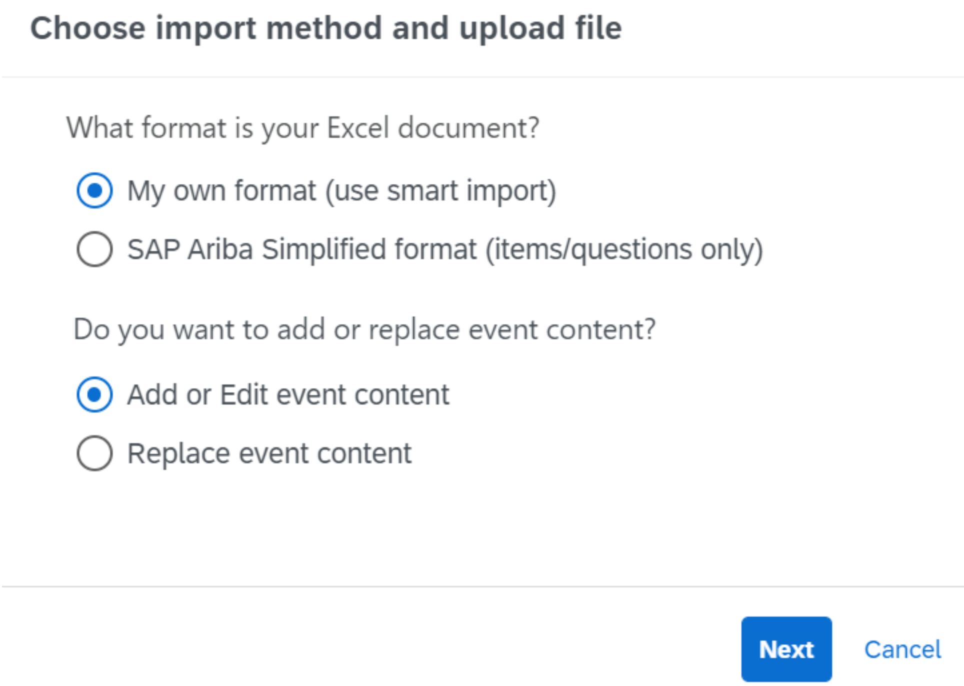
> Note
>
> You can have more than one sheet mapping to the same content type. If you import content from more than one sheet to a content type, content from different sheets are shown as sections.

The *Preview* page appears.

About 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.

Before you upload a file by using the smart import from Excel feature, you can choose the format of the file you wish to upload and also choose whether to replace the existing event entries or to update the existing event entries.



For more information, see Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311].

The Excel document that you plan to import can consist of new line items, new terms, or updated term values. When you upload the Excel document, items from the Excel are mapped with the items in the event based on their name.

> **Note**
>
> When you import content from Excel for an event in the draft state, you can select the format of the Excel document that you wish to import and select whether to replace the event content or update the event content. When you import content from Excel for an event in the open state, you can select the format of the Excel document that you wish to import and select to update the event content.

After you upload the file, you can review the mappings suggested for items and terms in the Excel file.

- You can change the item-level mapping by using the more icon (available for the specific item in the items table.
- Mapped items are updated if there are any attribute changes.

- Items from the Excel that are not mapped with the items in the event will be added as new items to the event.
- Mapped items will not be available for new item mapping in the user interface.
- You can change the term mapping by using the more icon (available for the specific term (column).
- If the updated Excel document consists of a new term, irrespective of its value, the term will be added to the event in the user interface.
- If you do not want to make any changes to an item that already exists in the event, then ensure not to add the line item to the Excel document that you plan to import.

Note that the initial term mapping considered during the first Excel import will be retained in the event when you plan to update the event content again by importing an updated Excel. You can change the term values; however, the values are defaulted based on the first import.

Below are some of the examples which describe different mapping scenarios.

Example 1: If the sourcing event consists of Item 1, Item 2, and Item 3 and the smart import Excel document consists of Item 1, Item 2, and Item 5, then:

- Item 1 from the Excel will be mapped to Item 1 in the event.
- Item 2 from the Excel will be mapped to Item 2 in the event.
- Item 5 from the Excel will be added as a new item. You can map Item 5 to Item 3 in the user interface by using the **Edit item** option from the more icon (available for the line item and choose Item 3 from the list of available items to map to.

Example 2: If the sourcing event consists of Item 1, Item 2, and Item 1, and the smart import Excel file consists of Item 1, Item 2, and Item 5, then:

- When two items with the same name exists, the system will consider them based on their order. Item 1 from the Excel will be mapped to the first Item 1 in the event.
- Item 2 from the Excel will be mapped to Item 2 in the event.
- Item 5 from the Excel will be added as a new item. You can map Item 5 to the second Item 1 in the user interface by using the **Edit item** option from the more icon (available for the line item and choose second Item 1 from the list of available items to map to.

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

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**.

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.

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.

Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing

Use this procedure to import event content, an alternative method of adding data to RFI or Auction events when you have the required information readily available in an Excel file.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must also 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 Smart import from Excel for guided sourcing events [page 676] 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**
- 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're creating an RFI or an Auction event in guided 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 smart import from Excel feature enables you to upload event content in your preferred format. SAP Ariba uses machine intelligence to interpret the data from the file and map it to various fields based on the global settings or template settings. You can review and revise the mappings before the data import is finalized.

> ⓘ Note
>
> The **Smart Import** option supports importing line items only. Importing service line items or service specifications is not supported.

Procedure

1. On the dashboard, click **Create > Guided Sourcing Project**.
2. Enter a name for the project.
3. Select the **Project type** as **Single event** and the **Event type** as **RFI** or **Auction**.
4. Click **Drag a file here or browse (<50 MB)** under the **Smart Import (optional)** section to select the file to upload.

   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 **To get started, you can download example spreadsheets**.

5. Select a project template from the **Template** section.
6. Click **Create**.

   The **Import content to your event from a spreadsheet** page appears. After the file is imported successfully, a popup **Manage worksheets** appears.
7. Review the worksheet 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 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 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.
   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 auction events, 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.

8. From the **Preview items** tab, review the item-level mappings. For more information about item-level mapping, see Reviewing Item-Level Mappings [page 97].
9. 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.

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 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).

Results

SAP Ariba creates a draft RFI or Auction event with the items and contents shown in the preview table.

Next Steps

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

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
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Creating Bid Transformation Events in Guided Sourcing

Bid transformation enables you to create competitive sourcing events and include cost terms to add specific costs to supplier bids. Use this procedure to create bid transformation events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- 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)
- Users must be allowed to create single-event projects (known as **Quick Projects** in the classic SAP Ariba Sourcing user interface) independent of full sourcing projects. The site configuration parameter **Types of sourcing events that the project owner can create** (`Application.AQS.AllowableProjectType`) must not be set to 1 (Project owners can create only **Full Projects**).
  If the site configuration parameter **Types of sourcing events that the project owner can create** is set to 1, team members with the Project Owner, Active Team Member, or Limited Team Member roles can create a guided sourcing event inside a guided sourcing full project.
- Ensure that the guided sourcing templates for bid transformation are available on the site. If the templates are not available on the site, run the scheduled task **EnableGuidedSourcingBTAuctionTemplatesTask** to import the bid transformation templates.

Context

Bid transformation is useful when the cost of working with different suppliers for specific goods and services differs on account of various factors unique to each supplier.

> **Example**
>
> Following is a scenario that qualifies for bid transformation in a sourcing event:
>
> You've invited suppliers from country/region AAA and country/region BBB to bid on the price of parts for a manufacturing company in the U.S. The U.S. charges a higher import duty on parts from country/region AAA, but the parts are cheaper.

The objective of bid transformation is to create competition by equalizing your total costs. You can add cost terms to the sourcing event to transform supplier bids into your costs. The 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.

Procedure

1. From the dashboard, select **Create** > **Guided Sourcing Project**.
2. Enter a name and description for the project.

   > **Note**
   >
   > The project name can't contain the following special characters: `\ / : ? " < > | # + % &`

3. Choose a value for **Test project**.

   > **Note**
   >
   > After you create a guided sourcing single-event project, you can change the **Test project** field's value while the event's state is **Draft**. After you schedule or publish an event, only team members with the **Event Administrator** role can edit the field.

4. Choose the project type as **Auction**.
5. Choose one of the following templates and answer any template questions that appear:
   - **Reverse Auction with Bid Transformation - Guided Sourcing Template**
   - **Dutch Reverse Auction with Bid Transformation - Guided Sourcing Template**
   - **Japanese Reverse Auction with Bid Transformation - Guided Sourcing Template**
6. Add lots or line items to the event as required.

   For information about adding lots to a guided sourcing event, see How to add lots to guided sourcing events.

   For information about adding line items to a guided sourcing event, see How to add line items in guided sourcing events.

   After adding a lot or line item, click the **Fx** link at the right of the lot or line item to see the initial extended price formula. The formula displays as **Price * Quantity** because you've not added a cost term yet.
7. Add a cost term to the lot or line item.

For information about adding cost terms to items or lots in a guided sourcing event, see How to add cost terms and cost items to guided sourcing events.

8. In the supplier view, validate the cost terms.

   After creating a cost term and entering specific values for each supplier, ensure that it works correctly. Under the **Suppliers** section of the event, click the ••• icon against a supplier name and select **Preview as supplier**. Verify that the **Ceiling Value** is equal to the value that you calculated with the transformation formula.

   > Note
   >
   > The supplier's maximum possible bid is also called the **Ceiling Value**. In a bid transformation event, each supplier has a different **Ceiling Value**.

9. (Optional) Override the transformed **Ceiling Value** for suppliers.

   You have the option to define a different ceiling price for suppliers in specific scenarios.

   > Example
   >
   > You've prenegotiated prices with suppliers.

10. Complete the event configuration and click **Create**.

Next Steps

Monitor the event to find suppliers with a leading total cost and award the event.

> Note
>
> - On the **Monitor** page and the **Award** page, the cost term is highlighted for each supplier. Suppliers with the best total cost for each line item as well as for the event are also highlighted.
> - A standard optimization scenario is available on the **Award** page with the goal to classify suppliers based on their total cost value. You can apply this scenario to identify suppliers with the best total cost for each line item and take informed awarding decisions.

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Related Information

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Creating a Guided Sourcing Project or Event from a Template [page 80]
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About Creating Total Cost Auctions and RFPs

Buyers can create total cost auctions and RFPs in guided sourcing.

You can specify cost items and cost terms and create total cost formulas that enable you to perform various arithmetic operations on the quoted price to factor in additional costs such as transportation, taxes, and so on to have a holistic view of the total cost involved. Cost terms can be defined as adders, subtractors, multipliers, and percent discounts.

You can define cost terms and cost items at the template level or at the event level.

Cost terms enable you to add costs that included while calculating the total cost. For more information about adder, subtractor, multiplier, or % discount, see Adder, Subtracter, Multiplier, and % Discount Cost Terms.

A cost item enables you to specify cost you want to include in total cost, but not award as a separate item. For example, you can add a cost item for total shipping cost or a total discount.

> ⓘ Note
>
> Your site must have guided sourcing templates for total cost RFPs and auctions. If the templates are not available on the site, run the scheduled task **EnableGuidedSourcingTotalCostTemplates** to import the guided sourcing templates for total cost RFP and auction to the site.

Parent topic: Guided Sourcing Project and Event Creation [page 76]

Related Information

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Creating Dutch Reverse Auctions for Guided Sourcing [page 113]
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Preparing RFP Templates for Total Spend Award Approval

Prepare RFP templates to use **Total Spend**, rather than **Baseline Spend**, for award approvals.

Context

Some buyer organizations have business processes which require delegating award approval authority or might involve a different approval flow based on **Total Spend**. For example, an organization might require approval from senior executives if the awarded amount exceeds a specific value.

Complete the following tasks to use **Total Spend** for triggering award approvals:

Procedure

1. Open the RFP template which you plan to use for **Total Spend** award approval, or create a new RFP template.
2. Select the event document and create a new **Approval for Award** task.
3. Optional: Set auto-approval to **Yes**.

   An example use case for auto-approval is if the **Total Spend** doesn't amount to enough to require escalated approvals.
4. Select the **Custom** option for **Approval Rule Flow Type**.
5. Click **Custom** to add a custom approval flow.
6. Select **Add Initial Rule**.
7. Create a **Rule Title**.
8. In the **Condition** section, click the dropdown and choose **Reference to Condition**.
9. Click **Create Condition**.
10. Fill in the name and description information for the condition.
11. Click the **Expression** dropdown and choose **Field Match**.
12. In the following dropdown that appears, choose **more fields...** at the botttom of the list.
13. Select the **Event** radio button at the top of the popup window.
14. Click **Select** next to **Total Spend**.

15. Configure the remaining options to complete the expression.

    By default, the expression uses `is equal to`, but you can select other options, such as `is greater than`.
16. Click **OK** to finish creating your condition.
17. In the **Action** section, select the **Action** dropdown menu and choose **Add Approvers**.
18. Add one or more approver.

    Approvers can be individuals or groups.
19. When you are done adding approvers, click **Done**.

Creating an English Reverse Auction Event in Guided Sourcing

Use this procedure to create English reverse auctions from the guided sourcing UI.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- Ensure that you run the scheduled task **EnableGuidedSourcingAuctionTemplatesTask** to create the reverse auction template for guided sourcing before you create a reverse auction event in guided sourcing.

Context

You can create an English reverse auction event from the guided sourcing UI by selecting the **Project type** as **Single event** and **Event type** as **Auction.**

You can also enable traffic light bidding [page 112] for an English reverse auction to provide additional feedback to participants by showing traffic light values based on their responses.

Procedure

1. From the guided sourcing UI, click **Create** > **Guided Sourcing Project**.

   The **Create guided sourcing project** appears.
2. Enter a name for the event.
3. Set the **Project type** as **Single event**.
4. Set the **Event type** as **Auction**.

5. From the **Template** dropdown, select a reverse auction template.
6. Click **Create**.

   The event preview page appears.
7. From the **Event duration** section, configure the timing rules appropriately. See the following table for details about the available rules:

Settings		Description	Condition
Start bidding right after event is published		Select this checkbox if you want the bidding to start as soon as the event is published. When this is selected, event preview is not available.	If you select this, the **Enable preview period** option is set to **No**.
Enable preview period		Set this to **Yes** if you want to enable a preview period for the event.	If you set this to **Yes**, the **Start bidding right after event is published** is unchecked. The following additional configuration options are enabled when **Enable preview period** is set to **Yes**:
	Start and end time for preview period	Select **Custom start and end time** or **Start after publish and end when auction begins**.	If you set this to **Custom start and end time**, the **Preview start time** and **Prebid end time** options appear.
	Can participants place bids during preview period	Select one of the following: • **Allow prebids** • **Do not allow prebids** • **Require prebids**	The **Prebid end time** option appears only if you select one of the following options: • **Allow prebids** • **Require prebids**
	Event bidding starts	Specify the start time for the bidding.	
Choose how lots will open and end, which provides the following options:		Select one of the following options: • **Parallel** to maintain the same opening and closing time for all lots. • **Staggered** to open all lots at the same time but to close the lots in a staggered manner. • **Serial** to open and close lots in a sequential manner where one lot opens only after the previous lot is closed.	If you select**Staggered**, the **Staggered end time increments** option appears. If you select **Serial**, the **Running time for each lot** appears.
Allow bidding overtime		Select **Yes** to allow bidding overtime.	If this is set to **Yes**, the following additional options appear.

Settings		Description	Condition
	Bid rank that triggers overtime	Specify the ranking of bids up to which you want to trigger overtime.	For example, if you set **Bid rank that triggers overtime** to **3** and the **Start overtime if bid submitted within (minutes)** to **4**, and **Overtime period (minutes)** to **5** an overtime of 5 minutes is triggered if any of the bids in the first three ranks is submitted in the last 4 minutes of the bid duration.
	Start overtime if bid submitted within (minutes)	Specify when do you want to trigger an overtime.	
	Overtime period (minutes)	Specify the additional time you want to extend the bidding to.	

8. Specify the event rules by clicking the more icon (•••) in the upper-right corner of the event page and selecting **Event settings** > **Set event rules**. See the Event rules reference guide for information about the rules.
9. From the **Suppliers** tab, add suppliers to the event.
10. From the **Items that need quotes** tab, add the line items and lots as necessary.

    You can also specify the following item-level bidding rules:
    - **Improve bid amount by** to specify whether the bid amount revision is set as percentage or nominal amount. If this is set as a read-only rule in the template, you cannot edit it. However, if this is set as delegate, you can modify the rule setting at the line-item level in the event.
    - **Bid decrement** to specify the minimum percentage or amount by which the bid amount has to be decreased to submit a revised bid. Whether this takes a percentage value or nominal amount depends on the setting for **Improve bid amount by**.
    - **Protect the lead bid with front buffer of** to specify the minimum buffer amount required to overtake a lead bidder.
    - **Protect the lead bid with back buffer of** to specify the minimum buffer between the lead bidder and the nearest competitor.
11. From the **Questions, requirements, and attachments** tab, add any other content that you want to add.
12. Review the settings and click **Publish**.

    The publish confirmation dialog box appears. You can either click **Monitor event** to monitor the event [page 496] or click **Go to dashboard** to go back to the sourcing dashboard.

Task overview: Guided Sourcing Project and Event Creation [page 76]

Related Information

Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Sourcing Request in Guided Sourcing from the For You Dashboard [page 85]
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Enabling Traffic Light Bidding in English Reverse Auctions in Guided Sourcing

Use this procedure to enable traffic light auctions, which are 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, or red traffic light.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.
- You must use an English reverse auction event created from a guided sourcing template with the event rule **Enable traffic light bidding** enabled.

Procedure

1. Open the English reverse auction in which you want to enable traffic light bidding. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. In the upper-right corner of the event page, click the more actions icon (•••) and select **Event settings** > **Set event rules**.
3. On the **Set event rules** page, enable the event rule **Enable traffic light bidding** in the **Bidding Rules** section.
4. In the **Items that need quotes** panel, add a lot or item and configure the following item-level bidding rules based on your needs:
   - **Show traffic light bidding icons for this lot or item**
   - **Show the green traffic light icon for the best bid only**
   - **Show the green traffic light icon when bids are this value or lower**
   - **Show the yellow traffic light icon when bids are this value or lower**

- **Show the red traffic light icon when bids are higher than this value**

> ⓘ Note
>
> You must set the first bidding rule **Show traffic light bidding icons for this lot or item** to **Yes** to see other four traffic light bidding rules. For more information about traffic light bidding rules, refer to Bidding Rules.

> ⓘ Note
>
> The value of the bidding rule **Show the red traffic light icon when bids are higher than this value** is automatically populated with the value you filled for the bidding rule **Show the yellow traffic light icon when bids are this value or lower**. Suppliers can see a red traffic light icon when they submit a bid that is higher than this value.

5. Save the changes and publish the event.

   The event moves to the **Monitor** state.

   After suppliers submit their bids, traffic light values are shown (**Green**, **Yellow**, or **Red**) in the **Items that need quotes** panel on the event page, or in the **Lots** and **Bid History** tables on the **Bid console** page.

Related Information

Creating an English Reverse Auction Event in Guided Sourcing [page 109]
Monitoring Auction Bids in Guided Sourcing [page 496]

Creating Dutch Reverse Auctions for Guided Sourcing

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

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must also 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 site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.
- Your site must have at least one template for guided sourcing Dutch reverse auctions, with the following settings:
  - The **Guided Sourcing Template** template property is set to **Yes**.
  - The **Bidding format for the event** event rule is set to **Dutch**.
  - For a line item's **Price** term, the **Will participants compete on this term?** rule is set to **Yes, Downward Bidding**.

Context

In a Dutch reverse auction, you are buying and the price automatically rises at configured intervals. 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 Dutch reverse auction, set the starting price just below the absolute lowest price for which you anticipate the seller is willing to sell it.

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 time between each page refresh is based on the **Bid adjustment interval**. For example, if the **Bid adjustment interval** is 5 minutes, then the page refreshes every 5 minutes.

Procedure

1. On the dashboard, select **Create** > **Guided Sourcing Project**.
2. For the **Event type**, choose **Auction**.
3. From the list of event templates, choose the **Dutch Reverse Auction - Guided Sourcing Template** or one of your own Dutch reverse auction templates.
4. Select **Create**.
5. Configure your **Event duration** rules.

   Select the **Edit** button to configure **Event duration**.

   > ⓘ 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, refer to the *Event rules reference guide*.

   The **Event duration** rules for Dutch auctions are:

   - **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.
   - **Running time for all other items**
     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).
6. Invite suppliers. Select **Invite supplier** and search for participants.

   See Inviting Event Participants for more information.
7. Add items, set item terms, and set item **Bidding Rules**. Select **Add** > **Item** from the **Items that need quotes** section.

   For a Dutch reverse 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).

   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).
     The initial price for the item must be within the lower and upper range values.

> ⓘ Note
>
> In a reverse auction where price levels are adjusted by a percentage of the current price (**Bid adjustment** 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.

8. **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 or open an existing line item for editing.
   b. In the **Terms** section, select **Edit term** for the **Quantity** term.
   c. For **Is a response required?**, select **Yes, participant must respond**.
   d. Configure values for the **From** and **To** fields.

      The **From** field defines a minimum quantity that the supplier can bid on. The **To** field defines a maximum quantity that the supplier can bid on.
9. Configure **Bidding rules**.

   The **Bid adjustment** setting controls the amount by which the price changes for each round (in percentages).
10. Configure any remaining items for the auction and click **Publish**.

    The publish confirmation dialog box appears. You can either click **Monitor event** to monitor the event [page 496] or click **Go to dashboard** to go back to the sourcing dashboard.

Next Steps

Use the **Bid console**, at the upper left corner of the event monitoring page, to 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.

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Creating a Japanese Reverse Auction in Guided Sourcing

Use this procedure to create a Japanese reverse auction from the guided sourcing user interface.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must also 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 site must have at least one guided sourcing template for Japanese reverse auctions.

> ⓘ Note
>
> A user with **Template Creator** capabilities can create a guided sourcing template for Japanese reverse auctions by copying a classic sourcing template for Japanese reverse auctions and setting the **Guided Sourcing Template** property to **Yes**, or by manually creating a guided sourcing template with the following settings:
> - The **Event type** option set to **Auction**.
> - The **Guided Sourcing Template** property set to **Yes**.
> - The **Bidding format for the event** rule set to **Japanese**.

Context

You can create a Japanese reverse auction from the guided sourcing user interface by creating a single-event project or creating an auction in a full project.

Procedure

1. Choose **Create** > **Guided Sourcing Project**.
2. Create a single-event project or create a full project.
   - To create a single-event project, which contains a single Japanese reverse auction:
     1. Enter a name and description for the event.
     2. Set **Project type** to **Single event**.
     3. Set **Event type** to **Auction**.
     4. From the **Template** dropdown list, select a Japanese reverse auction template.
     5. Click **Create**.
   - To create a full project that contains a Japanese reverse auction, refer to Creating a Guided Sourcing Event in a Full Project [page 89].

   The event preview page appears.
3. Edit the event.
   a. In the **Event duration** section, set timing rules.

Timing Rule	Description	Remarks
Start bidding right after event is published	Select this checkbox if you want the bidding to start as soon as the event is published.	If you select this, event preview is not avaliable, and the **Enable preview period** rule is automatically set to **No**.

Timing Rule		Description	Remarks
Enable preview period		Set this to **Yes** if you want to enable a preview period for the event.	If you set this to **Yes**, the **Start bidding right after event is published** rule is unchecked and the following additional options are enabled.
	Start and end time for preview period	Select **Custom** or **Start after publish and end when auction begins**.	If you select **Custom**, the **Preview start time** rule appears.
	Can participants anwser questions during preview period	Set this to **Yes** if you want participants to answer questions during the preview period.	If you set this to **Yes**, the **Answer end time** rule appears.
	Event bidding starts	Specify when the bidding starts.	
Choose how lots will open and end		This rule has a read-only value, **Serial**.	A Japanse auction uses serial bidding. One lot or item is open for bidding. When it closes, the next one opens.
Bid adjustment interval		Specify the interval at which the price drops by the amount or percentage specified in the **Bid adjustment** bidding rule.	
Bid ends when number of active participants reaches		Specify the minimum number of active participants for the bidding.	The bidding ends when the number of active participants drops to or below the configured minimum value.
Estimated award date		Specify an estimated date when the event is awarded	

b. In the upper-right corner, click the more icon (…) and select **Event settings** > **Set event rules**.

- **Show the number of active participants**
  Participants are active if they have accepted the price level for all bidding rounds or if the number of consecutive rounds they have missed does not exceed the number specified in the event bidding rule **Eliminate participant who misses this number of consecutive rounds**.
- **Show the number of inactive participants**
  Participants become inactive if they have missed the number of consecutive rounds specified in the event bidding rule **Eliminate participant who misses this number of consecutive rounds**.

> Note
>
> Both rules provide the following options:
> - **Not to any participants**
> - **To all participants**
> - **Only to active participants**

- For the other event rules, refer to Event rules reference guide.

> ⓘ Note
>
> A timing rule or event rule might not be visible or editable in events, depending on how the rule is configured by the template author.

c. From the **Suppliers** tab, invite suppliers to the auction.

   For more information, refer to Adding Suppliers (Participants) to Guided Sourcing Events [page 263].

d. From the **Items that need quotes** tab, add line items/lots and set item/lot-level bidding rules.

   There are the following item/lot-level bidding rules:

   - **Choose how lots will open and end**
     Shows a read-only value **Serial**, because a Japanse auction supports only serial bidding.
   - **Improve bid amount by**
     Specifies whether the bid amount drops by percentage or nominal amount.
   - **Bid adjustment**
     Specifies the percentage or amount by which the bid amount has to drop for each round. Whether this takes a percentage value or nominal amount depends on the setting for **Improve bid amount by**.
   - **Range**
     Specifies the price range (lower and upper value). The target price is the lower value in the range; bidding ends for the item when the target price is reached.
     The initial price for the item must be within the lower and upper range values, inclusive.

e. From the **Questions, requirements, and attachments** tab, add any other content that you require.

4. Click **Publish**.

   The publish confirmation dialog box appears. You can either click **Monitor event** to monitor the event [page 496] or click **Go to dashboard** to go back to the sourcing dashboard.

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Creating Dutch Forward Auctions for Guided Sourcing

Use this procedure to create a Dutch forward auction. In Dutch forward 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. You use this type of event when suppliers are prequalified and when there are few suppliers.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must also 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 site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.
- Your site must have at least one template for guided sourcing Dutch forward auctions, with the following settings:
  - The **Guided Sourcing Template** template property is set to **Yes**.
  - The **Event Type** template property is set to **Forward Auction**.
  - The **Bidding format for the event** event rule is set to **Dutch**.
  - For a line item's **Price** term, the **Will participants compete on this term?** rule is set to **Yes, Upward Bidding**.

Context

In Dutch forward 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. A Dutch auction pressures participants to bid the best price they possibly can and to bid before their competitors can take the business away. 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 Dutch forward auction, set the starting price above your intended target price for which you anticipate the buyer is willing to purchase it.

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.
- Disables the ability to import responses using Microsoft Excel.
- The time between each **Bid console** page refresh is based on the **Bid adjustment interval**. For example, if the **Bid adjustment interval** is 5 minutes, then the **Bid console** page refreshes every 5 minutes.

Procedure

1. On the dashboard, select **Create** > **Guided Sourcing Project**.
2. For the **Event Type**, choose **Forward Auction**.
3. From the list of event templates, choose the **Dutch Forward Auction - Guided Sourcing Template** or one of your own Dutch forward auction templates.
4. Select **Create**.
5. Configure your **Event duration** rules.

   Select the **Edit** button to configure **Event duration**.

   > 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, refer to the *Event rules reference guide*.

   The **Event duration** rules for Dutch auctions are:

   - **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.
   - **Running time for all other items**
     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).

6. Invite suppliers. Select **Invite participants** and search for participants.

   Refer to Inviting Event Participants for more information.

7. Add items, set item terms, and set item **Bidding rules**. Select **Add** > **Item** from the **Items that need quotes** section.

   For a Dutch forward auction, set the starting price above your intended target price at which you think suppliers will sell (the price will decrease each round).

   The item **Bidding Rules** for Dutch auctions are:

   - **Bid adjustment**
     The amount by which the price changes for each round.
   - **Bidding price range**
     Price range (lower and upper value). For Dutch forward auctions, the target price is the higher value in the range; set the lower value to the lowest price you are willing to accept. Bidding ends for the item in a Dutch forward auction when a participant accepts the price or when the price 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.

8. **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 or open an existing line item for editing.
   b. In the **Terms** section, select **Edit term** for the **Quantity** term.
   c. For **Is a response required?**, select **Yes, participant must respond**.
   d. Configure values for the **From** and **To** fields.

      The **From** field defines a minimum quantity that the supplier can bid on. The **To** field defines a maximum quantity that the supplier can bid on.

9. Configure **Bidding rules**.

   The **Bid adjustment** setting controls the amount by which the price changes for each round (in percentages).

10. Configure any remaining items for the auction and click **Publish**.

    The publish confirmation dialog box appears. You can either select **Monitor event** to monitor the event [page 496] or select **Go to dashboard** to go back to the sourcing dashboard.

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Creating a Survey Event [page 128]
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Creating an English Forward Auction in Guided Sourcing

Use this procedure to invite participants to buy goods and services by creating an English forward auction event in guided sourcing.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- Ensure that the guided sourcing template **Forward Auction - Guided Sourcing Template** for forward auctions is available on the site. If the templates are not available, run the **EnableGuidedSourcingEnglishAndDutchForwardAuctionTemplatesTask** scheduled task to import the forward auction template.
- To create an English forward auction with bid transformation, ensure that the guided sourcing template for bid transformation **Forward Auction with Bid Transformation - Guided Sourcing Template** is available on the site. If the template is not available, run the **EnableGuidedSourcingBTForwardAuctionTemplatesTask** scheduled task to import the bid transformation template for English forward auction.

Context

English forward auctions are created to bring participants into direct competition to purchase your goods and services. In a forward auction event, you can:

- Create line items for each item that you want to sell.
- Group line items into lots to create a package of goods or services for participants to bid on.
- Specify floor and reserve prices, timing rules, and other strategic rules, to maximize competition.

Procedure

1. From the dashboard, click **Create** > **Guided Sourcing Project**.

   The **Create guided sourcing project** appears.
2. Enter a name for the event.

   > **Note**
   >
   > The project name can't contain the following special characters: `\ / : ? “ < > | # + % &`
3. Set the **Project type** as **Single event**.
4. Select the **Event type** as **Forward Auction**.
5. From the **Template** dropdown list, select **Forward Auction - Guided Sourcing Template**.

   To create an English forward auction with bid transformation, select **Forward Auction with Bid Transformation - Guided Sourcing Template**.
6. Click **Create**.

   The event preview page appears.
7. In the **Event duration** section, configure the timing rules appropriately.

   The available rules are described below:
   - **Start bidding right after event is published**: Select this checkbox if you want the bidding to start as soon as the event is published.
     If you select this checkbox, the **Enable preview period** option is set to **No** implying that the event cannot be previewed before publishing.
   - **Enable preview period**: Set this to **Yes** if you want to enable a preview period for the event.
     If you set this setting to **Yes**, the **Start bidding right after event is published** is deselected and the following additional configuration options are available:
     - **Start and end time for preview period**: Select **Custom** or **Start after publish and end when auction begins**. If you select **Custom**, the additional options **Preview start time** and **Prebid end time** are available.
     - **Can participants place bids during preview period**: Select **Allow prebids**, **Do not allow prebids**, or **Require prebids**. You can configure the **Prebid end time** setting only if you have set the **Can participants place bids during preview period** setting to **Allow prebids** or **Require prebids**.
     - **Event bidding starts**: Specify the start time for the bidding.
   - **Choose how lots will open and end**: Select one of the following options:

        - **Parallel** to maintain the same opening and closing time for all lots. If you select this option, an additional option **Event bidding ends** is available where you can specify the event duration or end time.
        - **Staggered** to open all lots at the same time but to close the lots in a staggered manner. If you select this option, the additional options **Running time for first lot** and **Staggered end time increments** are available for configuration.
        - **Serial** to open and close lots in a sequential manner where a lot opens only after the previous lot is closed. If you select this option, an additional option **Running time for each lot** is available for configuration.
    - **Set a review period after lot or item closes**: Select this option if you want to review participant bids and reopen bidding after the bidding process has ended. If you select this option, an additional option **Review time period** is available where you can specify the time period during which you can review the bidding results, discuss with participants, and take necessary actions.
    - **Allow bidding overtime**: Select **Yes** to allow bidding overtime. If this setting is set to **Yes**, the following additional options are available:
        - **Bid rank that triggers overtime**: Specify the ranking of bids up to which you want to trigger overtime.
        - **Start overtime if bid submitted within (minutes)**: Specify when overtime must be triggered.
        - **Overtime period (minutes)**: Specify the additional time to extend the bidding.

    > Example
    >
    > If you set **Bid rank that triggers overtime** to **3**, **Start overtime if bid submitted within (minutes)** to **4**, and **Overtime period (minutes)** to **5**, an overtime of 5 minutes is triggered if any bid in the first three ranks is submitted in the last 4 minutes of the bid duration.

8. To specify the event rules, click ••• in the upper-right corner of the event page and select **Event settings** > **Set event rules**. For information about the rules, see the Event rules reference guide.
9. In the **Participants** tab, add participants to the event.
10. In the **Items that need quotes** tab, add line items and lots as necessary.

    You can also use the following item-level bidding rules:
    - **Improve bid amount by** to specify whether the bid amount revision is set as percentage or nominal amount. If this is set as a read-only rule in the template, you cannot edit it. However, if this is set as delegate, you can modify the rule setting at the line-item level in the event.
    - **Bid increment** to specify the minimum percentage or amount by which the bid amount has to be increased to submit a revised bid. The **Improve bid amount by** setting determines whether this setting takes a percentage value or nominal amount.
    - **Protect the lead bid with front buffer of** to specify the minimum buffer amount required to overtake a lead bidder.
    - **Protect the lead bid with back buffer of** to specify the minimum buffer between the lead bidder and the nearest competitor.
11. To an English forward auction bid transformation event:
    a. Add a cost term to the lot or line item.

    For information about adding cost terms to items or lots in a guided sourcing event, see How to add cost terms and cost items to guided sourcing events.

    b. In the participant view, validate the cost terms.

Under the **Participants** section of the event, click the ••• icon against a participant name and select **Preview as participant**. Verify that the **Floor Value** is equal to the value that you calculated with the transformation formula.

> ⓘ Note
>
> The participant's maximum possible bid is also called the **Floor Value**. In a bid transformation event, each participant has a different **Floor Value**.

c. (Optional) Override the transformed **Floor Value** for a participant.

You have the option to define a different floor price for a participant in specific scenarios.

12. In the **Questions, requirements, and attachments** tab, add the necessary content.
13. Review the settings and click **Publish**.

The confirmation dialog box appears. You can either click **Monitor event** to go to event monitoring or click **Go to dashboard** to go back to the sourcing dashboard.

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Creating a Survey Event [page 128]
Monitoring English Forward Auction Activity in Guided Sourcing [page 499]
Guided Sourcing Event Types [page 31]

Creating a Survey Event

Buyers using guided sourcing can create survey events in guided sourcing projects.

Support for survey events in guided sourcing projects enables seamless to-and-fro access between the guided sourcing interface and the classic sourcing interface where the survey workflow, including creating and monitoring, takes place.

You can create a survey either by using the **Create** > **Document** option or from a survey template in the project if your guided sourcing project contains a survey template. When you create a survey by using the **Create** > **Document** option, you can choose any of the available survey templates. However, when you create a survey from a survey template that is available in the project template, you cannot change the template.

Surveys are listed in the **Project Insights** section if the project template contains the **Project Insights** section. You can also choose to add surveys to the **Quick Links** section for easy access.

Parent topic: Guided Sourcing Project and Event Creation [page 76]

Related Information

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Creating an English Forward Auction in Guided Sourcing [page 124]

Creating a Survey in a Guided Sourcing Project

You can create survey events in your guided sourcing projects.

Prerequisites

- You must be a member of the **Category Buyer** user group.
- You must also be a member of a user group with permissions for creating sourcing projects or a group that is authorized for creating surveys (**SPM Agent**) in the supplier management application.

Context

You can create a survey in a guided sourcing project either by using the **Create** > **Document** option or from a survey template that is available in the sourcing project template you have created the sourcing project from. If you use the survey template from the sourcing project, you cannot change the survey template when you create the survey.

The creating and monitoring a survey are performed from the classic sourcing interface. When you choose to create a survey, the **Create Survey** page from the classic sourcing interface is displayed. After you create the survey, you can navigate back to the project in the guided sourcing interface.

> Note
>
> - If you click the back button (**<**) in the shell bar when you are in the *Draft* view of a survey, the **Dashboard** is displayed instead of the project page in guided sourcing.
> - If you have opened the survey from the dashboard, the **Actions** > **View Project** option in the survey opens the project in the classic sourcing interface unless the **Application.AQS.NavigateToNewUI** parameter for the site is set to **Yes**.
> - You cannot create a **Publish Document Task** if it is not part of the survey template.
> - You cannot create document choice-type surveys in guided sourcing. You can only select a survey that is available on your site.
> - Because surveys are created and monitored from the classic sourcing interface, the accessibility capabilities in those pages might vary from the accessibility capabilities in guided sourcing.

Procedure

1. Perform one of the following steps:
   a. If your project template contains survey templates, click a survey template from the **Events and other documents** section.

      The **Edit event** page appears.

b. From the sourcing project, click **Create** > **Document**.

The **What do you want to create?** dialog box appears.

2. If you followed Step 1.a [page 129], fill out the details in the **Edit event** page and click **OK** and proceed to Step 5 [page 130]. Else, skip to Step 3 [page 130].

> Note
>
> You cannot change the template when you are creating a survey based on a survey template in a project.

3. If you followed Step 1.b [page 130], click **Survey** from the **What do you want to create?** dialog box.

   The **Create Event** page appears.
4. Fill out the details in the **Create Event** page, select a survey template, and click **Create**.
5. Specify the values as required in the **Rules**, **Participants**, and **Content** sections.
6. When you exit the survey event, click **Return to project** to go back to the guided sourcing project.

   After you create a survey, the survey appears in the **Project Insights** section as well as the **Events and other documents**. You can also choose to add the survey to the quick links section.

> Note
>
> The create and monitor surveys are done from the classic interface of SAP Ariba Sourcing.

Related Information

Creating Quick Surveys

Guided Sourcing Project Linking

You can link guided sourcing projects together using multi-stage projects or with subprojects.

- **Multi-stage projects** enable you to copy content, suppliers, and bids from one event to the next. You can use multi-stage projects to model the different stages of a multi-stage negotiation. You can begin with an RFI, continue with an RFP, and finish with an auction, while copying information over from stage to stage.
  Multi-stage projects are linked as predecessor and follow-on projects and configured using the **Predecessor** field in the **Project details**. A predecessor project can be a **Single event** project or a **Full project** that contains events, but cannot be an event within a full project. If a predecessor project is a **Full project** that contains multiple events, you select which event you want to copy data from.
  The **Predecessor** field can be configured after a project is created.

  > Note
  >
  > Classic sourcing supports multi-stage projects. However, classic sourcing multi-stage projects can link only Quick Projects as predecessor and follow-on projects.
  >
  > 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.

- **Subprojects** can be sourcing projects, sourcing requests, or other project types, such as contract workspaces. The types of subprojects you can create depends on the groups you belong to.
  SAP Ariba provides links between subprojects and parent projects so you can easily open a subproject from its parent project and vice-versa.
  You cannot make a project a subproject after it is created. You create subprojects from the **Events and other documents** panel. Select **Create** > **Document**, then select the type of subproject you want to create.

  Creating and Using Multi-Stage Projects [page 131]

  Creating a Subproject in a Guided Sourcing Full Project [page 134]

Creating and Using Multi-Stage Projects

Use this procedure to link guided sourcing projects as **predecessor** and **follow-on** projects and copy project data to your guided sourcing follow-on projects.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- To edit an existing project or event, you must be the owner or have project owner capabilities for the project or event.

- To create a new project, you must be a member of at least 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)

Restrictions

- You can copy a document from a predecessor project only if you have permission to access the document.
- You can copy event and project data only from events and projects that are supported in guided sourcing. For example, contract workspaces and sourcing requests are not supported in guided sourcing.
- Contract workspaces are not supported in guided sourcing. If you create a contract workspace as a follow-on project, you are redirected to the classic event creation page.
- To copy participant responses, you must first invite the suppliers you want to copy responses from.
- You can copy participant responses from predecessor projects as participant-specific initial values in successor projects, but you can't submit participant responses in predecessor projects as initial bids in successor projects.
- Analytical reports in the follow-on projects do not include information from the predecessor project.

Context

To create a multi-stage project, you create multiple 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. You can use multi-stage projects to model the different stages of a multi-stage negotiation. You can begin with an RFI, continue with an RFP, and finish with an auction, while copying information over from stage to stage.

A predecessor project can be a **Single event** project or a **Full project** that contains events, but cannot be an event within a full project. If a predecessor project is a **Full project** that contains multiple events, you select which event you want to copy data from.

Copying project data allows you to reuse it in events. It helps you by:

- Saving you from having to re-create identical content multiple times.
- Allowing you to copy bids as participant-specific initial values.
- 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
>
> Classic sourcing supports multi-stage projects. However, classic sourcing multi-stage projects can link only Quick Projects as predecessor and follow-on projects.
>
> 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.

Procedure

1. To link a guided sourcing project as a predecessor project:
   a. From the **Create guided sourcing project** page, select the **Predecessor** dropdown menu.
      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.
   b. From the dropdown, either choose a recent project or choose the **Select other...** link to search for projects that are not in the recent projects list.
      If you chose **Select other...**, continue to step 1.c [page 133].
   c. From the **Choose predecessor project** page, select one or more projects that you want to link to your follow-on project.
   d. When you are finished, click the **Select** button.
2. To copy event information, such as **Commodities**, **Regions**, and **Departments**, from predecessor projects:
   a. From the **Create Guided sourcing project** page, select the **Copy from predecessor project** button.
      If your project has only one linked predecessor project, the event information is copied from the predecessor to the follow-on project. Otherwise, continue to step 2.b [page 133].
   b. On the **Predecessor project** popup, choose a project to copy event information from.
      If you chose a **Full project**, you must also select which event within your **Full project** to copy event information from.
   c. Click **Ok**.
3. **Optional:** To add project team members from predecessor projects:
   a. While working in a follow-on guided sourcing project, select the **Team** icon ( ) at the top of the event page.
   b. Select the **Copy from predecessor project** button.
   c. From the **Predecessor project** popup window, choose a predecessor project to copy project team members from.
4. To invite suppliers from predecessor projects:
   a. While working in a follow-on guided sourcing project, select **Invite suppliers** > **From predecessor project** from the **Suppliers** section.
   b. Choose one or more suppliers to invite to your follow-on project.
   c. Select **Add** when you are finished.
5. To add items and participant responses for items from predecessor projects:
   a. While working in a follow-on guided sourcing project, select **Add** > **Items from predecessor project** from the **Items** section.

b. From the **Add content from Projects** page, select a predecessor project to add items from. Select the items you want to add and click **Select**

   If you have already invited suppliers and the system detects matching supplier responses for the items you are adding, a popup window appears. On the popup window, you can choose to copy participant responses as participant-specific initial values.

6. To copy documents from a predecessor **Full project**:
   a. While working in a follow-on guided sourcing **Full project**, select **Create** > **Document** from the **Events and other documents** section.
   b. On the **What do you want to create?** window, select **Copy from predecessor project**.
   c. Select a document to copy.
   d. Select **Copy**.

Task overview: Guided Sourcing Project Linking [page 131]

Related Information

Creating a Subproject in a Guided Sourcing Full Project [page 134]
Copy bid currency types for conversion when copying events

Creating a Subproject in a Guided Sourcing Full Project

Use this procedure to create subprojects to divide complex projects into smaller parts while maintaining a hierarchical relationship.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must meet one of the following requirements:
  - You can create project documents.

    > ⓘ Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides document creation and editing capabilities for a project. However, you must also be a member of additional global groups to create certain types of documents in a project.

    - You're the project owner.
    - You have project owner capabilities for the project.
- To add subprojects of a certain type, you must be a member of a system group that provides create capabilities for that project type. For instance, you must be a member of one of the following groups to create sourcing subprojects:

  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)

  Refer to Strategic Sourcing and Supplier Management Group Descriptions for more on system group capabilities.

Context

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

When you create a subproject in a guided sourcing full project, the subproject appears as a document in the parent project's **Events and other documents** table and SAP Ariba stores the subproject in the parent project's folder hierarchy. In addition, the parent project appears in the subproject's **Project summary** panel, under the **Related projects** section.

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

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

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

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

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

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** panel, select **Create** > **Document**, then choose the type of subproject you'd like to create.
3. Follow the procedure for creating your chosen project type.

Task overview: Guided Sourcing Project Linking [page 131]

Related Information

Creating and Using Multi-Stage Projects [page 131]
Creating a Guided Sourcing Project or Event from a Template [page 80]
Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77]

Guided Sourcing Full Project Views and Edits

You can choose to view guided sourcing full projects using the classic sourcing interface or the guided sourcing interface. You can also edit global information about the project.

A **full project** can contain multiple events and supports all project management features, including phases, tasks, project documents, and project teams. Full projects can also contain multiple subprojects with events that share planning and savings tracking information. Full projects enable multiple users to work on the same documents or events with defined roles and processes, as well as tasks.

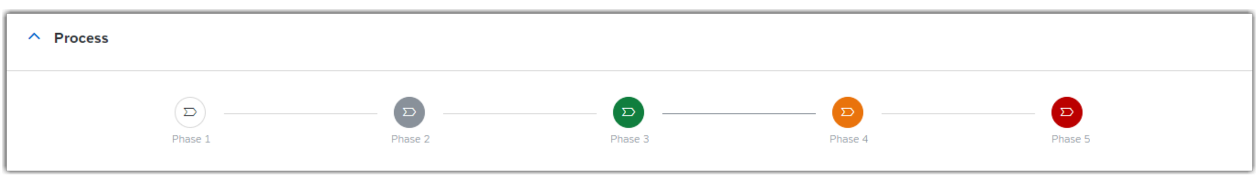
About the Guided Sourcing Full Project Process Panel

Visualize your project's progress with the **Process** panel's process flow diagram.

The **Process** panel provides a simple visual way to track the progress of your project. The panel's diagram includes a node for each phase in the **Tasks** table, and the diagram updates dynamically when you add, remove, or rearrange phases.

Node Colors

The color of a node in the diagram indicates the state of its corresponding project phase.



> **Note**
>
> The **Process** panel's diagram only shows a node for each of the parent, or root, phases in a project. If you add a phase inside a parent phase, the nested phase (subphase) doesn't appear in the diagram.

The following table describes each node colors and its associated phase states:

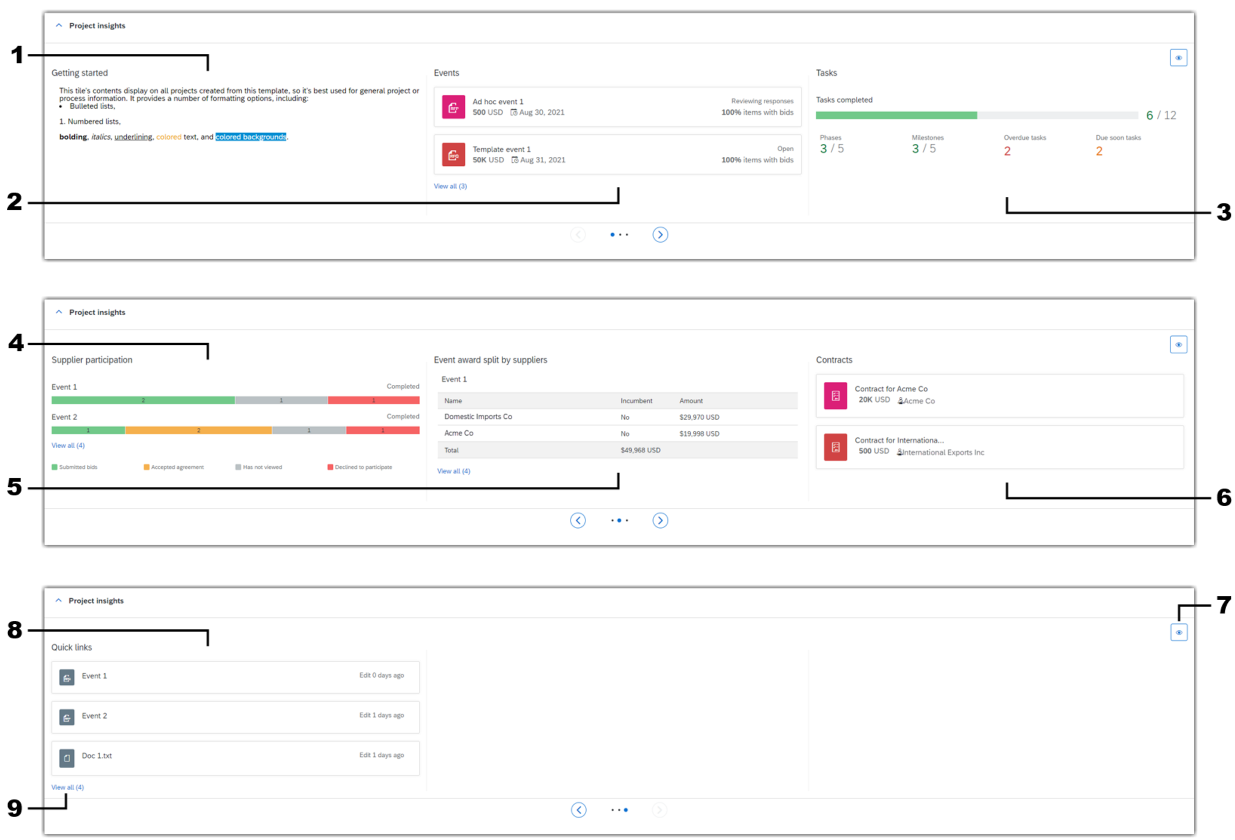
This Node Color	Represents This Phase State
No color	Not started
Gray	In progress
Green	Complete

This Node Color	Represents This Phase State
Orange	Due soon A phase is due soon when one or more of its tasks have a due date set within the following 7 days.
Red	Overdue A phase becomes overdue when one or more of its tasks have a due date that has already passed.

About Guided Sourcing Project Insight Tiles

Project insight tiles provide a clear visual summary of the status of different project components, such as tasks and events.

Project insight tiles are available in projects created from template with the tiles configured. For more on this procedure, refer to Configuring Insight Tiles for Guided Sourcing Full Projects



1. The **Getting started** tile displays read-only rich text content entered in the tile's text editor on the project template.

2. The **Events** tile displays a card for each of the project's events. Selecting a card opens the event for editing or monitoring, depending on the event's state. Events display in the tile in the order that they're arranged in the **Events and other documents** table.
3. The **Tasks** tile shows an overview of the project's tasks, organized by status.
4. The **Supplier participation** tile displays a colored graph of supplier statuses for each event in the project. Events display in the tile in the order that they're arranged in the **Events and other documents** table.
5. The **Event award split by suppliers** tile displays a table summarizing the awarded business for each event in the project. Events display in the tile in the order that they're arranged in the **Events and other documents** table.
6. The **Contracts** tile displays a card for each contract created from an awarded event in the project. Selecting a contract's card opens the contract in the classic SAP Ariba Sourcing interface.
7. Use the **Show/hide insight tiles** menu to control which tiles display in the **Insight tiles** panel while you're viewing the project. Any changes reset when you close the project.
8. The **Quick links** tile displays a card for each project document added as a quick link. Selecting a document's card opens the document or its details page, depending on the document's type and status.
9. Select a tile's **View all** text to show the tile's full contents. This view includes any overflow items that aren't displayed in the **Project insights** panel.

Viewing a Guided Sourcing Full Project in the Classic Sourcing Interface

If you're a member of the **Category Buyer** group, guided sourcing full projects open in the guided sourcing interface by default, but you can switch to the classic SAP Ariba Sourcing view from the **More actions** menu. Use this procedure to switch to the classic SAP Ariba Sourcing interface.

Prerequisites

- You must meet any access control requirements for the project.

Context

If you meet a project's access control requirements but aren't a member of the **Category Buyer** group, guided sourcing full projects open in the classic SAP Ariba Sourcing interface by default.

Procedure

1. Open a guided sourcing full project.

2. In the upper-right corner of the page, select the project's **More actions** icon (•••) and choose **Switch to classic sourcing view**.

Editing a Guided Sourcing Full Project's Summary Information

Use this procedure to edit or complete project information fields and template questions from the **Project summary** panel while viewing a guided sourcing full project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

You initially complete project information fields (also known as header fields) during the project creation process [page 76]. Depending on how your organization configures its project templates, the values you choose for these fields may impact certain aspects of the project, such as the project workflow, automatically generated project content, and project team membership.

After creating a project, you can edit most information fields in the **Project summary** panel. Notable exceptions include the following categories:

- Fields that can't be changed after creating a project
  - **Test Project**
  - **Base Language**
- Auto-populated fields
  - **Start Date**
    Displays the date the project is set to **Active**.
  - **End Date**
    Displays the date the final required task in the project is set to **Complete**.
  - **Due Date**
    Displays the due date for the project task due furthest in the future. For example, if a project contains two tasks, one due February 1st, 2021 and one due March 10th, 2021, then the project's **Due Date** field will display the March 10th, 2021 date.

In addition to project information fields, you can also edit your responses to any template questions in the **Project summary** panel.

> ⓘ Note
>
> If your organization uses template conditions to control project content, changing the values of project information fields or template questions may alter the contents of your project.

Procedure

1. Open a guided sourcing full project.
2. Show the full **Project summary** panel by selecting the panel's **Expand** icon ( ).
3. In the **General information** or **Related projects** section, select **Edit**.
4. Edit or complete any project fields as necessary.

   > ⓘ Note
   >
   > If your company uses template conditions to control project content, changing project field values after creating the project may alter some of the project's contents.
5. Select **Save** to apply the changes or **Cancel** to discard them.

Changing the State of a Guided Sourcing Full Project

Use this procedure to change the state of a guided sourcing full project. The project state is a reportable value that provides project participants and other users with an indication of a project's progress.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

When creating a guided sourcing full project, you can choose either **Active** or **Planned** for the project state. Choosing **Planned** allows you to specify the project's planned start and end date.

A project’s state remains the same until you manually edit it. It does not change based on other actions you perform on the project.

You can change the state as needed throughout the project's lifecycle, but certain conditions restrict the available states:

- If a project contains in-progress or completed tasks, you can't choose **Planned**.
- If a project contains uncompleted required tasks, you can't choose **Completed**.

When setting the state to **Cancelled**, you must enter an end date for the project.

See Project State for the full list of possible states.

Procedure

1. Open a guided sourcing full project.
2. In the upper-right corner of the page, select the project's **More actions** icon (•••).
3. Under the **SET PROJECT STATE TO** header, choose a new project state.

Results

The new project state shows in the project page's header.

Deleting a Guided Sourcing Full Project

While you can delete guided sourcing full projects when needed, your company's configurations may require a project to meet certain criteria to be deleted. Use this procedure to delete a guided sourcing full project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.
- Your company's setting for the configuration parameter Application.ACM.ProjectDeleteLimited may restrict when you can delete guided sourcing full projects.
  If this parameter is set to `true` (the default value), a project must meet the following criteria to be deleted:
  - The project doesn't contain any in-progress or completed tasks.
  - The project doesn't contain any in-progress or completed events.

  If this parameter's value is `false`, you can delete a guided sourcing full project at any time.

Context

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

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

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

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

Procedure

1. Open the project you'd like to delete.
2. In the upper-right corner of the page, select the **More actions** icon (•••) and choose **Delete project**.
3. Select **Delete**.

Viewing the Project History in a Guided Sourcing Full Project

This procedure demonstrates how to use the project history to view a record of important project activities, including automatically completed actions and actions performed by project owners, team members, and task participants.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

The **Project history** popup contains the **Activities** table, which logs changes to a project and other activities completed in a project.

Each entry in the **Activities** table contains the following information:

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

For a more detailed view of the project history and the option to export it, use the classic sourcing interface's [page 139] **History** tab.

Procedure

1. Open a guided sourcing full project.
2. In the upper-right corner of the page, select the **More actions** icon (•••) and choose **View project history**.

Next Steps

Filter the results, as needed.

- Select **Show filters** and enter field values to filter entries.
- Select the gear icon ( ) to open a selector for choosing the columns you want to show or hide.
- Use the search box to find entries.

Documents and Reusable Content in Guided Sourcing Projects and Events

You can add documents to guided sourcing projects, such as instructions or reference material. You can also add reusable documents and event contents (such as line items) from the **sourcing library** to projects and events.

Guided sourcing supports the following types of documents in full projects:

- **Non-executable files** uploaded from your file system, such as the following types of documents:

  Microsoft Word
  Microsoft Excel
  Microsoft PowerPoint
  ASCII
  Graphic files, such as PNG, BMP, JPEG, or GIF
  PDF

  Select the **Upload** button in the **Events and other documents** panel to upload a non-executable file [page 328] to a guided sourcing full project.
  You can also add a non-executable file to an event as a requirement or attachment [page 397] in the **Questions, requirements, and attachments** panel or as an attachment term to a line item [page 337].
- Form documents, which are custom data-entry pages designed for a specific organization's business needs. Examples of forms include project resource sheets, asset tracking forms, and deal sheets.
  To add form documents to a project, your site must have templates implemented for form documents. Templates for form documents are implemented by SAP Ariba for customers. For more information about using SAP Ariba Services to implement forms for your site, please contact your SAP Ariba customer representative.
  Select the **Add** button in the **Events and other documents** panel to create a form in a guided sourcing full project.
- Savings forms, which are a special type of form used to track savings and spend so you can measure the success of sourcing or supplier management programs, and to generate savings reports.
  Savings forms are disabled by default. To enable savings forms, the **Enable savings forms** parameter must be set to **Yes**. For information about this parameter, see Self-Service Site Configuration Options for Savings Forms. For information about managing parameters, refer to Intelligent Configuration Manager Administration.
  Select the **Add** button in the **Events and other documents** panel to create a savings form in a guided sourcing full project.
- Analytical reports, such as reports that show the amount of money spent in events, event lots, and supplier participation.
  Select the **Add** button in the **Events and other documents** panel to create an analytical report in a guided sourcing full project.
- **Content documents**, which are documents from the sourcing library [page 177]. The sourcing library can contain non-executable files that may be used in multiple projects and events. The sourcing library can also include event content (line items, lots, sections, questions, requirements, and attachments) that may be used in multiple events.
  Select the **Add** button in the **Events and other documents** panel to add a content document to a guided sourcing full project.

Related Information

Adding Line Items in Guided Sourcing Events [page 337]
Adding Requirements and Attachments to Guided Sourcing Events [page 397]
Creating and Using Form Documents
Sourcing Reporting Basics
Creating a Form in a Guided Sourcing Full Project [page 163]
Using Savings Forms in Guided Sourcing [page 173]
Creating an Analytical Report in a Guided Sourcing Full Project [page 165]
Use of Savings Forms to Track Savings

Available Actions in the Events and other documents Table in Guided Sourcing Full Projects

You can complete essential document-related actions directly in the **Events and other documents** panel in guided sourcing full projects.

The following tables describe useful document- and folder-related actions available in the **Events and other documents** panel:

- Viewing and Editing
- Copying and Moving
- Saving, Deleting, and Replacing
- Uploading and Creating

Your capabilities in a project control the document-related actions available to you.

Project owners, team members with project owner capabilities, and document owners can complete most of the document-related actions, although other users, like reviewers with edit access, can also complete document-related actions in certain situations.

To review the specific prerequisites for certain actions, refer to Approval Tasks in Guided Sourcing Full Projects [page 216].

Viewing and Editing

To Complete This Action,	Follow These Steps
View a document's or folder's details	Select a document's or folder's **More actions** icon (•••) and choose **View details**.
Preview a document	Select a document's name. If a document's file type isn't supported for previewing, the document downloads automatically.
Edit a document's or folder's detail fields	Select a document's or folder's **More actions** icon (•••) and choose **View details**. Then, in the **Document details** or **Folder details** panel, select **Edit**.
Prevent other users from editing a document or a folder's contents	Select a document's or folder's **More actions** icon (•••) and choose **Lock** or **Lock folder contents**. To make an item available again, select the **More actions** icon (•••) and choose **Unlock** or **Unlock folder contents**. If you set the **Lock document** field to **Yes** on a review or approval task, the task's associated folder or document locks automatically when you submit the task. The associated folder or document unlocks automatically after the task meets one of the following criteria: • For an approval task, the approval flow completes • For a review task, you set the task's status to **Complete** If a folder contains a subproject when you lock the folder's contents, all of the documents in the subproject lock as well.

Copying and Moving

To Complete This Action,	Follow These Steps
Copy a document	Check the box next to a document's name and then select **Copy**. Check the boxes for multiple documents to copy them all at the same time or check the box for a folder to copy its contents.

To Complete This Action,	Follow These Steps
Move a document or folder to another location in the table	Check the box next to a document's or folder's name and then select **Move**. To move multiple items at the same time, check the boxes for more than one document or folder.
Make a document available for use in other projects	Select a document's **More actions** icon (•••) and choose **Publish**.
Make a document or folder you use often easy to access	Select a document's or folder's **More actions** icon (•••) and choose **Add to quick links**. To remove the quick link, select the same document's or folder's **More actions** icon (•••) and choose **Remove from quick links**. View the current project's quick links by going to the **Project insights** panel's **Quick links** widget.

Saving, Deleting, and Replacing

To Complete This Action,	Follow These Steps
Save a new version of a document	Select a document's **More actions** icon (•••) and choose **View details**, then go to the document details page's **Version history** section and select **Save as a new version**. ⓘ Note This option is only available when the current version of a document has been edited but not saved as a new version or published. To indicate this status, the document's version displays as **vn (editing)**, where **n** is the number of the previously saved or published version.
Delete previous, unpublished versions of a document	Select a document's **More actions** icon (•••) and choose **Delete old versions**. Deleting the previous draft versions of a document also does the following: • Deletes any comments associated with the previous document versions • Changes the version of the document associated with any tasks to the most recent version

To Complete This Action,	Follow These Steps
Delete a document or folder	Check the box next to a document's or folder's name and then select **Delete**. To delete multiple items at the same time, check the boxes for more than one document or folder. ⓘ Note You can delete a document or folder only if you're its owner and it meets all of the following conditions: • It's not inherited from the project's template • It's not associated with any tasks
Replace a document	Select a document's **More actions** icon (•••) and choose **Replace document**. You can replace a document with a document you upload or a document already in your site.

Uploading and Creating

To Complete This Action,	Follow These Steps
Upload a document to your project	Select **Upload** to choose files from your computer or drag them directly onto the **Events and other documents** table's **Drag a file here** text. Add more than one document at the same time using the following methods: • Choose multiple documents from the upload screen. • Drag multiple files onto the **Events and other documents** table's **Drag a file here** text. • Upload one or more ZIP files and choose to extract the contents. A document's filename can't exceed 241 characters or contain any special characters. The file types allowed to upload are: bmp,cif,csv,doc,docm,docx,dotx,gif,htm,html,jpeg,jpg,log,mpp,mpt,odp,ods,odt,pdf,png,potx,ppsx,ppt,pps,pptx,ps,rar,rtf,sldx,tiff,tif,txt,wpd,xlr,xls,xlsx,xltx,xml,xps,oxps,zip
Create a folder or subfolder	Select **Create** > **Folder** to create a new folder, or select an existing folder's **More actions** icon (•••) and choose **Create subfolder**.
Add a copy of a document from another project to the current project	Select **Create** > **Document** and then choose **Copy documents from content finder** to choose a document that already exists in your site to copy to the project.
Create a sourcing event or subproject from a template document inherited from the project template	Select a template document's name to open the event or project creation page. You can't choose an event's type when creating it from an inherited event template document.

To Complete This Action,	Follow These Steps
Create a new sourcing event	Select **Create** > **Document** and then choose **Sourcing event**. The project template's reusable event template documents determine the event templates available when creating new events. For more on creating guided sourcing events, refer to Guided Sourcing Project and Event Creation [page 76].
Create a new subproject	Select **Create** > **Document** and then choose a subproject type. When creating a sourcing project as a subproject, follow the procedure in Creating a Guided Sourcing Project or Event from a Template [page 80] or Creating a Guided Sourcing Project or Event by Copying an Existing Project or Event [page 77].
Create a task associated with a document	Select a document's **More actions** icon (•••) and choose **Create task**. Available task types vary depending on the document type.

Parent topic: Documents and Reusable Content in Guided Sourcing Projects and Events [page 145]

Related Information

Creating a Folder in a Guided Sourcing Full Project [page 151]
Uploading a Document to a Guided Sourcing Full Project [page 152]
Setting Access Controls for Guided Sourcing Full Projects, Project Documents, and Events [page 154]
Viewing a Document's or a Folder's Details, Associated Tasks, and Version History in a Guided Sourcing Full Project [page 156]
Replacing a Document in a Guided Sourcing Full Project [page 158]
Editing a Document's or a Folder's Details in a Guided Sourcing Full Project [page 160]
Copying an Existing Document into a Guided Sourcing Full Project [page 161]
Creating a Form in a Guided Sourcing Full Project [page 163]
Creating an Analytical Report in a Guided Sourcing Full Project [page 165]
Savings Forms in Guided Sourcing [page 166]
Sourcing Library, Content Documents, and Guided Sourcing [page 177]
Guided Sourcing Project and Event Creation [page 76]
Documents and Reusable Content in Guided Sourcing Projects and Events [page 145]
Tasks in Guided Sourcing Projects [page 182]

Creating a Folder in a Guided Sourcing Full Project

This procedure demonstrates how to use folders to organize your project's documents in the **Events and other documents** table.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create project documents.

    > Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides document creation and editing capabilities for a project. However, you must also be a member of additional global groups to create certain types of documents in a project.
  - You're the project owner.
  - You have project owner capabilities for the project.

Context

You can use folders and subfolders to structure and organize the contents of the **Events and other documents** table. Additionally, if you want to associate multiple documents with a single task, you can collect the documents in a folder and create one task for the entire folder.

A folder allows you to create a snapshot of its contents at a particular point in time by saving a new version of the folder. Whenever you change a folder's contents by adding or removing documents, a draft version of the folder is created. After you finish adjusting the folder's contents, you can use the option in the folder details page's **Version history** panel to save the updated contents as a new version of the folder.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** panel, complete one of the following actions:
   - Create a new folder by selecting **Create** > **Folder**.
   - Create a new subfolder by selecting an existing folder's **More actions** icon (•••) and choosing **Create subfolder**.
3. Enter a name for the folder.

4. Complete any additional fields as necessary.

   See Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of folder fields.
5. Select **Create**.

Task overview: Documents and Reusable Content in Guided Sourcing Projects and Events [page 145]

Related Information

Available Actions in the Events and other documents Table in Guided Sourcing Full Projects [page 146]
Uploading a Document to a Guided Sourcing Full Project [page 152]
Setting Access Controls for Guided Sourcing Full Projects, Project Documents, and Events [page 154]
Viewing a Document's or a Folder's Details, Associated Tasks, and Version History in a Guided Sourcing Full Project [page 156]
Replacing a Document in a Guided Sourcing Full Project [page 158]
Editing a Document's or a Folder's Details in a Guided Sourcing Full Project [page 160]
Copying an Existing Document into a Guided Sourcing Full Project [page 161]
Creating a Form in a Guided Sourcing Full Project [page 163]
Creating an Analytical Report in a Guided Sourcing Full Project [page 165]
Savings Forms in Guided Sourcing [page 166]
Sourcing Library, Content Documents, and Guided Sourcing [page 177]

Uploading a Document to a Guided Sourcing Full Project

Use this procedure to add reference materials and other documents to the project by uploading them in the **Events and other documents** panel.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create project documents.

    > ⓘ Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides document creation and editing capabilities for a project.

> However, you must also be a member of additional global groups to create certain types of documents in a project.

- You're the project owner.
- You have project owner capabilities for the project.

Context

As a best practice, the name of any file uploaded to the project should meet the following requirements:

- The filename doesn't contain any of the following characters: `\ / : ? “ < > | # + %` &.
- The filename is fewer than 241 characters long.

When uploading a ZIP file to the project, you can choose between the following options:

- Upload as a ZIP file
- Unzip the compressed file and upload the documents it contains instead

For a description of common project document types, refer toManagement of Project Documents.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** panel, select **Upload**.

   > Note
   >
   > You can also upload documents by dragging them onto the bottom section of the **Events and other documents** table.

3. Choose the files you want to upload and then select the appropriate button to continue. For example, on a computer running Microsoft Windows, select **Open**.
   a. When uploading a ZIP file, choose whether you'd like to keep the file zipped or extract and upload the individual documents instead.

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Setting Access Controls for Guided Sourcing Full Projects, Project Documents, and Events

This procedure demonstrates how to use access controls to specify which team members can view a project or document.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the object's owner, the project owner, or have project owner capabilities for the project.

Context

You can specify which user groups can access different objects in a guided sourcing full project. Access-controlled objects include events, documents, folders, and the project itself. If you set an access control for a project, all documents in the project inherit that access control as well.

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

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

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

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

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

Procedure

1. Locate the object you'd like to set an access control for and open it for editing:
    - To set or edit the project's access control, go to the **Project summary** panel, show the full panel by selecting the **Expand** icon ( ), then select the **General information** section's **Edit** button.
    - To set or edit an event's, document's, or folder's access control, go to the **Events and other documents** panel, select the object's **More actions** icon (•••), then choose **View details**. On the object's details page, select the details panel's **Edit** button.
2. Select the **Access controls** field's value help icon ( ).
3. In the **Select access controls to be applied** popup, check the box for each access control you'd like to set for the object.

    A single object can have multiple access controls.
4. Select **Save**.
5. In the project's **General information** section or the object's details panel, select **Save** to apply your changes.

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Viewing a Document's or a Folder's Details, Associated Tasks, and Version History in a Guided Sourcing Full Project

This procedure demonstrates how to use the folder and document detail pages to view information not available in the **Events and other documents** table.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet any access control requirements for the document.

Context

The details page for a document or a folder contains the following panels:

- **Document details** or **Folder details**, which displays the detail fields for a document or folder
  You can edit the fields in this panel if you have the necessary project capabilities.
- **Associated tasks**, which displays the tasks associated with a document or folder
  You can complete a task's action or create a new task from this panel if you have the necessary project capabilities.
- **Version history**, which displays the previous versions of a document or folder
  This panel contains different options for documents and folders:
  - For a document, you can use this panel to open the details page of or download a previous version of the document.

    > Note
    >
    > A document owner can remove previous, unpublished (draft) versions of a document by using the **Delete previous draft versions** option. In this case, the **Version history** table only includes the most recent version and any previously published versions of the document.
  - For a folder, you can use this panel to open the details page of a previous version or save the current folder contents as a new version.

The folder details page also includes a **Documents** panel. This panel displays each document in the folder and lets you complete the following actions:

- Download all the folder's documents
- Lock the folder's contents
- Preview, download, or open a document, depending on the document's type
- Download, publish, or lock an individual document
- Delete a document that was uploaded to the current project

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** table, select a document's or a folder's **More actions** icon (•••) and choose **View details**.

   The document's details page opens in read-only mode.
3. **Optional:** View the document's associated tasks or version history by completing one of the following actions:
   - In the page's header, select **Associated tasks**.

     > ⓘ Note
     >
     > Select a task's name in the table to open the task's details page.
     >
     > If you're assigned the appropriate capabilities in the project, you can also use this panel to create a new task for the document or complete actions for existing tasks.
   - In the page's header, select **Version history**.

     > ⓘ Note
     >
     > You can view the details of or download a specific version of the document by selecting a row's **More actions** icon (•••) and choosing **View details** or **Download**.

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Replacing a Document in a Guided Sourcing Full Project

Use this procedure to replace a document from the **Events and other documents** table, which is one way to create a new document version in guided sourcing full projects.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the document owner, the project owner, or have project owner capabilities for the project.

Context

The most common reason to replace a document is to upload a new version of it. You can replace a document from a task associated with the document as well as directly in the **Events and other documents** table.

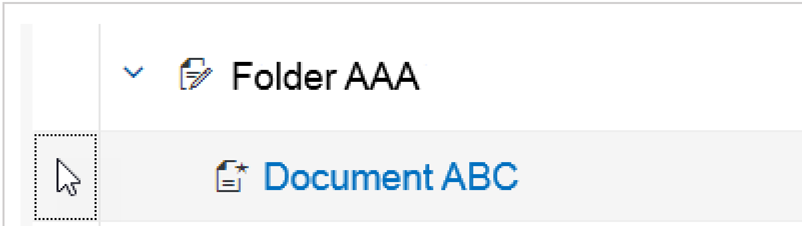
You can replace a document in the **Events and other documents** table at any time, as long as you have the correct project capabilities and the document isn't locked.

If you replace a document in the **Events and other documents** table while an associated approval or review task is in progress, the task typically remains associated with the previous document version until you create a new task round. However, if the task is a template task configured to synchronize approval flows with the latest document version, replacing the document automatically creates a new task round associated with the current document version. Refer to *Synchronizing approvals with the latest document version* in Multiple Task Rounds and Document Version Tracking for more on this type of configuration.

For more on replacing a document from an associated task, refer to Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196].

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** table, select a document's **More actions** icon (•••) and choose **Replace document**.
3. Locate the file you'd like to use, either in the content finder or your computer's file directory:
    - In the content finder, select **Current workspace** to browse or search the current project's documents, or select **All workspaces** to browse or search the contents of templates, knowledge areas, and other projects. After locating the correct document, click the selection box that appears next to your desired row and select **Next**.



Your user interface may differ from this image.

- In your computer's file directory, choose the desired file and then select the appropriate button to continue. For example, on a computer running Microsoft Windows, select **Open**.

4. Choose an answer for the question **Do you want to save this as a new version of the document?**.
    - Choose **Yes** to overwrite the existing document (version n) with a new version (version n+1).
    - Choose **No, keep the existing version number** to overwrite the existing document (version n) with an edited version of the current version. With this choice, the document's version displays in the user interface as **vn (editing)**.
5. Select **Replace**.

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Editing a Document's or a Folder's Details in a Guided Sourcing Full Project

Use this procedure to edit or customize the details of documents and folders to match your project's requirements.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the document owner, the project owner, or have project owner capabilities for the project.

Context

You can edit or complete the detail fields of documents and folders created manually for the project or inherited from the project template. You might want to edit these fields for an inherited document or folder if your company's templates include documents or folders that you can customize to match your use case.

You can edit the following document and folder fields directly in the **Events and other documents** table:

- **Name**
- **Owner**

If you change the value of a detail field for a folder or document and save your changes, the folder or document saves as a new version. This applies to changes made from the **Events and other documents** table as well as the document or folder details page.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** table, select a document's or a folder's **More actions** icon (•••) and choose **View details**.

   The document's details page opens in read-only mode.
3. In the **Document details** or **Folder details** panel, select **Edit**.
4. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.

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Copying an Existing Document into a Guided Sourcing Full Project

Use this procedure to copy an existing document to reuse it in your current project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
    - You can create project documents.

      > ⓘ Note
      >
      > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides document creation and editing capabilities for a project. However, you must also be a member of additional global groups to create certain types of documents in a project.

    - You're the project owner.
    - You have project owner capabilities for the project.

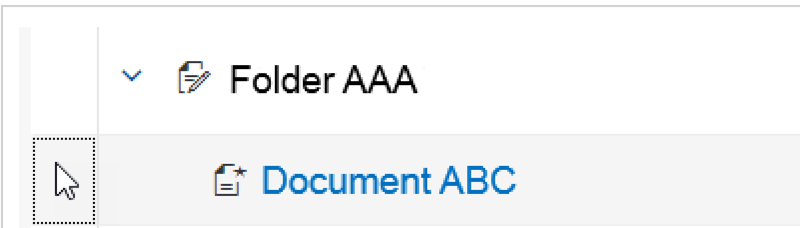
Context

In addition to uploading, you can also add documents to your project by copying them from other projects, workspaces, or knowledge areas.

You can use this procedure to add documents that were previously uploaded to the site, such as Microsoft Word or Excel files, as well as documents that were created directly in SAP Ariba, like events or forms.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** panel, select **Create > Document > Copy documents from content finder**.
3. Search for a specific document or expand a folder hierarchy to view all documents available from that type of project.
4. Hover over the left column, then click the selection box that appears next to your desired row.

   Your user interface may differ from this image.
5. Select **Copy**.

Results

A copy of your selected document is added to the current project's **Events and other documents** table.

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Creating a Form in a Guided Sourcing Full Project

Use this procedure to create a form in a guided sourcing full project.

Context

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

Examples of forms include:

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

Forms provide the following features:

- Form documents have header fields and can have line item fields (or detail fields). Line items are multiple instances (lines) of the same fields and are useful for creating lists of items with the same fields, such as a list of items in a sales order.
- Each field has a specific data type, such as text, integer, money, date, or a custom data set. Fields can also have pick lists or drop-down menus.
- You can specify if fields are required, editable, or visible. You can also create conditions based on other field values to determine these properties.
- Field values can be calculated from other field values. In this example, **Cost** is calculated by multiplying **Quantity** by **Unit Price**.
- Header fields values can be calculated as the sum of line item field values. In this example, the **Total Cost** is the sum of the line item **Cost** values.

- Header fields can be used as search filters when searching for documents; line item fields are not searchable.
- A form can be pre-configured with tasks in a project template as a prototype form document. When the form document is created in a project, the tasks are also created.
- Form documents are not stored as files on the SAP Ariba server, but you can export line items to a Microsoft Excel document.
- Field values can be exported for reports.

Procedure

1. Open a guided sourcing full project.
2. From the **Events and other documents** panel, choose **Create** > **Document**.

   A popup opens, showing the types of documents you can create and asking you which type of document you want to create.
3. Choose **Form** and then choose **Next**.
4. Select the type of form you want to create, then choose **Create**.
5. Fill in the information for the form:
   a. Enter the title and description.
   b. Choose the base language from the drop-down menu.
   c. Select whether the form is a test form.
   d. **Optional:** Select additional users in the **User Multiple Select** field.
   e. **Optional:** Check the **Announce the creation of this new document.** box if you want to add an Announcement to the project the document is in.
6. Choose **OK**.
7. Choose whether to save and continue editing the form as v0, or to save as v1.

   > ⓘ Note
   >
   > If you choose to save as v1, add a comment in the **Version Comment** field.
8. Choose **Save**.
9. When you're ready to publish the form, open the form and choose **Publish**.

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Creating an Analytical Report in a Guided Sourcing Full Project

Use this procedure to create an analytical report in a guided sourcing full project.

Context

Analytical reports are reports that show the amount of money spent in events, event lots, and supplier participation.

Procedure

1. Open a guided sourcing full project.
2. From the **Events and other documents** panel, choose **Create** > **Document**.

   A popup opens, showing the types of documents you can create and asking you which type of document you want to create.
3. Choose **Analytical report** and then choose **Next**.

   The **Source Data** page opens.
4. Fill in the information for the report:
   a. Enter the title and description.
   b. Choose the report currency from the drop-down menu.
   c. Choose the main fact from the drop-down menu.
   d. **Optional:** Choose the second and third facts from the drop-down menus.
   e. Add fields from the **Available Measures** section to add to the report, or create a user-defined field.
5. Choose **Next**.

   The **Pivot Layout** page opens.
6. Select fields from the **Available Hierarchies** section to add to the report.
7. Choose **Next**.

   The **Refine Data** page opens.

8. Fill in the information to filter the data in your report.
9. If you aren't ready to run the report, choose **Save**, then **Save** again. If you're ready to run the report, choose **Run Report**.

Next Steps

For more information on sourcing reports, see Sourcing Reporting Basics.

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Savings Forms in Guided Sourcing

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

Using savings data in reports

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

- Savings Summary Report: This report displays the amount of savings your company has achieved for a given time period. It provides an executive overview of savings achieved by various departments.

- Savings Detail Report: This report displays spend and savings data for all projects executed in a given time period.
- Actual Savings Report: This report displays the amount of actual savings realized when you begin to purchase items per project.

These reports are comprised of project header data, event data as the event progresses, and savings data that you enter. See Running Analytical Reports for details on reporting. You can create multiple savings forms. In that case, the multiple forms are shown in the reports in multiple rows.

Preventing line item editing in savings forms

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

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

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

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Loading Savings Allocation Details from Excel in Guided Sourcing [page 175]

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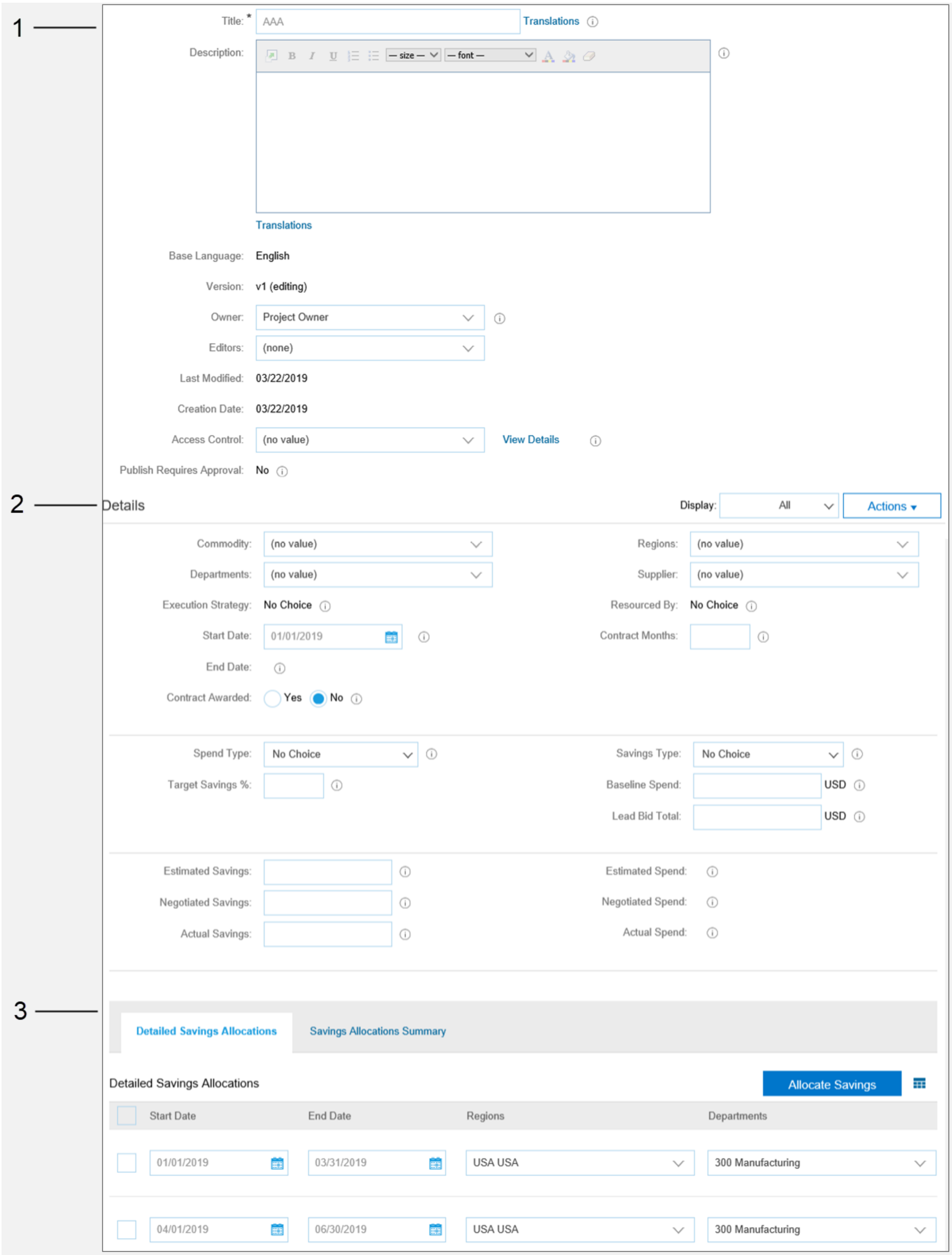
Savings Form Sections

This topic provides information about the different sections available in a guided sourcing savings form.

From top to bottom, a savings form has three sections:

1. **Document Information** (top section): General information and properties about the savings form document (such as the **Title**, **Description**, **Owner**, and access information).
2. **Header** (middle section, labeled **Details**): Contains savings information, including total ("rolled up") spend and savings amounts, commodities, and suppliers.
3. **Allocation Details** (bottom section): An optional section that enables you to break down, or allocate your savings data by time (months, quarters, or years) or other fields (dimensions) in your savings form, such as region or department. For example, you might want to record the savings realized by each department in your organization. This section contains the following tabs:
    - **Detailed Savings Allocation**: Use this tab to add line items with savings allocation information. Each line item has fields for the time period, savings and spend values, and dimensions. You can create multiple savings forms in a single project, so you can create different forms to allocate and analyze savings for a single project by different factors.
    - **Savings Allocations Summary**: This tab contains a summary of savings allocation values.


1
Title: *
AAA
Translations
Description:
— size —
— font —
Translations
Base Language:
English
Version:
v1 (editing)
Owner:
Project Owner
Editors:
(none)
Last Modified:
03/22/2019
Creation Date:
03/22/2019
Access Control:
(no value)
View Details
Publish Requires Approval:
No
2
Details
Display:
All
Actions
Commodity:
(no value)
Regions:
(no value)
Departments:
(no value)
Supplier:
(no value)
Execution Strategy:
No Choice
Resourced By:
No Choice
Start Date:
01/01/2019
Contract Months:
End Date:
Contract Awarded:
Yes
No
Spend Type:
No Choice
Savings Type:
No Choice
Target Savings %:
Baseline Spend:
USD
Lead Bid Total:
USD
Estimated Savings:
Estimated Spend:
Negotiated Savings:
Negotiated Spend:
Actual Savings:
Actual Spend:
3
Detailed Savings Allocations
Savings Allocations Summary
Detailed Savings Allocations
Allocate Savings
Start Date
End Date
Regions
Departments
01/01/2019
03/31/2019
USA USA
300 Manufacturing
04/01/2019
06/30/2019
USA USA
300 Manufacturing

The savings form header and allocation detail sections include the following field types:

- Savings form field values from the project header [page 170]. These are general information fields that can be pre-populated or updated from the project header fields, including commodities, regions, departments, baseline spend, and target savings.
- Savings form field values from SAP Ariba Sourcing awarded events [page 171]. These are fields that can uploaded from an SAP Ariba Sourcing awarded event in the same project, including negotiated amounts and leading bid amounts.
- Savings Amounts fields [page 171].
- Baseline Spend and Spend Type fields [page 171].
- Savings Type field [page 172].

Custom fields can also be added to the savings tracking form document. See your local administrator to add custom fields to the form.

In addition to savings form fields with values uploaded from project header fields or event fields, you can configure savings form header fields to:

- Upload values to project header fields. See Savings form header field values uploaded to project header fields [page 172].
- Get values from the sum of allocation line items. See Savings form header fields from rolled-up line values [page 173].

Savings form field values from the project header

You can manually enter fields values into the savings form. When you create a savings form in a project, the following fields are pre-populated with fields from the project header.

The following fields are pre-populated with values from the project header:

- **Base language**
- **Commodity**
- **Regions**
- **Departments**
- **Baseline spend**
- **Target savings percentage**
- **Contract months**
- **Sourcing mechanism**
- **Execution strategy**
- **Contract effective date** (which is used as the start date on the savings form)

The values for these fields can also be updated from the project header during a project life cycle, as described in Using Savings Forms in Guided Sourcing [page 173].

Savings form field values from SAP Ariba Sourcing awarded events

The following savings form field values can be uploaded from an SAP Ariba Sourcing awarded event in the same project:

- **Baseline spend** (can update value provided from the header information)
- **Negotiated spend**
- **Negotiated savings**
- **Lead bid total**

The values for these fields can also be updated from an event, as described in Using Savings Forms in Guided Sourcing [page 173].

Savings Amounts fields

You can enter and edit the following savings form fields for savings amounts during any stage of your project or sourcing event:

- **Estimated Savings**: The savings that you estimate to accrue as a result of executing the project. Also known as forecasted, target, or expected savings. Enter this amount at the beginning of the project.
- **Negotiated Savings**: The savings negotiated during the project. This is typically the awarded savings. This can be derived from the project, or entered during the course of the project.
- **Implemented Savings**: Savings amount that could be implemented based on the contract. Also known as planned or contract savings. Enter this data after the contract has been awarded.
- **Actual Savings**: The actual savings realized when you begin to purchase items named in the contract. Also known as realized savings. Enter this data after the contract is being used to implement purchases and actual costs are known.

By default, savings amounts are shown in the event currency. If the savings form is for a multi-currency event, the **Allow currencies in savings allocation details** can be set to **Yes** to enable you to select a currency for each entry. For information about this parameter, see Self-Service Site Configuration Options for Savings Forms. For information about managing parameters, refer to Intelligent Configuration Manager Administration.

Baseline Spend and Spend Type fields

The values that are calculated in a savings form are based on baseline spend, which represents the amount of spend from which you want to base your savings. The **Spend Type** field allows you to specify the reason for your baseline spend value:

- **Historic**: The amount paid previously for the good or service.
- **Market**: The amount established by the market.
- **Estimated**: An estimated price established by the buyer.
- **Industry Published Price**: A price published in an industry journal or derived from other another third party publication.
- **Vendor Published Price**: A price published by a supplier or vendor.

- **Average of Opening Offers**: The average price resulting from running an initial quote such as an RFP.
- **Vendor Opening Offer**: A single supplier's quote (such as an incumbent), usually arrived at after running an RFI or RFP.
- **Budget**: The amount established by a budget.

Savings Type field

The **Savings Type** field in a savings form enables you to specify the reason for your target savings value:

- **Cost Avoidance**: Indirect or "soft" cost savings that are indirectly related to the sourcing process and result in lower costs; for example, paying 5% more for a good or service when the industry average is 10%, or negotiating a delay in price increase.
- **Cost Reduction**: Direct or "hard" cost savings that are directly related to the sourcing process and result in lower costs.
- **Price Increases**: Savings achieved despite price increases; for example, if prices increase less than expected.
- **Asset/Inventory Recovery**: Savings achieved through reductions in excess inventory or assets.
- **Working Capital**: Savings achieved through acquisition or management of working capital.
- **Compliance**: Savings achieved through compliance with contracts.
- **Demand Management**: Savings achieved through central management of demand from different purchasing units.
- **Signing Bonus**: Savings achieved through a bonus for signing a contract with the vendor.
- **Rebate**: Savings achieved through a rebate from the vendor.
- **Vendor Paid Costs**: Savings resulting from the selected vendor paying some portion of costs, such as for shipping.

Savings form header field values uploaded to project header fields

A savings form header field can be configured by SAP Ariba so that its value is uploaded to a matching project field (a field with the same type and field name). The savings form field can be configured to either:

- Automatically upload its value to the project field.
- Prompt to ask if you want to upload the value to the project header.
  You will see a prompt similar to the following:
  Check this box if you would like Baseline Spend field(s) in the Project to be updated from the SavingsForm
  By default, the **Baseline Spend** field is configured with the prompt option.

Savings form header fields from rolled-up line values

A savings form header field can be configured by SAP Ariba so that values from matching savings allocation line items are summed up and written (rolled up) to the form header field when the form is saved or published. By default, the following fields are configured with this option:

- **Baseline Spend**
- **Actual Savings**
- **Estimated Savings**
- **Implemented Savings**
- **Negotiated Savings**

Parent topic: Savings Forms in Guided Sourcing [page 166]

Related Information

Using Savings Forms in Guided Sourcing [page 173]
Loading Savings Allocation Details from Excel in Guided Sourcing [page 175]

Using Savings Forms in Guided Sourcing

Use this procedure to create, update, and print a savings form in a guided sourcing full project.

Prerequisites

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

Context

Savings forms [page 166] are a special type of form used to track savings and spend so you can measure the success of sourcing or supplier management programs, and to generate savings reports.

Procedure

1. Open a guided sourcing full project.
2. From the **Events and other documents** panel, choose **Create** > **Document**.

   A popup opens, showing the types of documents you can create and asking you which type of document you want to create.
3. Choose **Savings form** and then choose **Next**.
4. Fill in the information for the form:
   a. Enter the title and description in the appropriate fields.
   b. Choose the base language from the drop-down menu.
5. Choose **Create**.

   The **Edit Savings Form** page opens. Fields listed in Savings form field values from the project header [page 170] are prepopulated from the project header.
6. Edit or modify values as needed. See Savings Form Sections [page 168] for more information on the different areas of the savings form.
7. Choose **Save as Draft** if you aren't ready to publish; choose **Publish** if you are and then **Publish** again.
8. **Optional:** Print the savings form:
   a. Choose **Print** in the upper-right corner of the page.
   b. Choose **Print** again in the **Print** panel.

Next Steps

For information on using an Excel sheet to load savings allocation details, see Loading Savings Allocation Details from Excel in Guided Sourcing [page 175].

Task overview: Savings Forms in Guided Sourcing [page 166]

Related Information

Savings Form Sections [page 168]
Loading Savings Allocation Details from Excel in Guided Sourcing [page 175]

Loading Savings Allocation Details from Excel in Guided Sourcing

Use this procedure to load savings allocation details from an Excel sheet.

Prerequisites

If you want to allocate savings by a dimension, such as department, verify that the dimensions (fields) you want to use have values specified in the header section of the savings form. The values for these fields will be used to prepopulate the Excel spreadsheet and you can't enter additional values for these fields in the spreadsheet. In most cases, the values for these fields will be populated from the project header.

> ⓘ Note
>
> By default, **Commodity**, **Region**, and **Departments** fields are available as dimension fields.

Context

Saving allocation details enable you to break down, or allocate your savings data by time (months, quarters, or years) or other fields (dimensions) in a savings form. You can load saving allocation details from an Excel file.

Procedure

1. Create or open a savings form.
    - To create a savings form, use the procedure in Using Savings Forms in Guided Sourcing [page 173].
    - To open an existing savings form, navigate to the **Events and other documents** panel. Select the document name and choose **Open**.
2. If the savings form doesn't already contain savings allocation details (line items), define the time periods and dimensions you want to use.
    a. Choose **Allocate Savings**. The **Allocate Savings** button is in the top right corner under the **Detailed Savings Allocations** tab and only appears when the savings form is editable.
    b. The **Create Savings Allocation** page opens. Select the time periods and dimensions you want to allocate the savings across.

    > ⓘ Note
    >
    > The options on the **Create Savings Allocation** page are only available under certain conditions:
    >
    > - **Breakdown date by** is available only if values for both **StartDate** and **EndDate** have been specified in the savings form header.
    > - **Fields** are available only if they have corresponding values in the savings form header section. Administrators can add additional fields or restrict the values available for use as dimension fields.

3. Generate an Excel spreadsheet that you will edit to specify savings allocation values.
    - If you're adding initial savings allocation values and have the **Create Savings Allocation** page open, go to **Step 2** and choose the **Click here to open an excel template based on the above selections** link.
    - If the savings form already has savings allocation values, choose **Excel Export/Import** from the **Detailed Savings Allocation** tab of the savings form. The **Import Detailed Savings Allocation** page opens; go to **Step 1** and choose the **Click here to open your detailed savings allocations in an Excel Spreadsheet** link.

    SAP Ariba exports all visible fields on the **Savings Form** page to the Excel spreadsheet.

    Fields with multiple values are displayed in the Excel spreadsheet in drop-down pick lists. If the length of all the multiple values exceeds 255 characters, the multiple values are not displayed in a drop-down pick list.

    The generated Excel spreadsheet contains 3 sheets:

Breakdown Percentage	In most cases, the Breakdown Percentage sheet is the only sheet you need to edit. You use the Breakdown Percentage sheet to allocate the percentages for each type of savings by date or dimension. Enter percent values in the cells indicated by color. The percentages you enter on this sheet are used to calculate the savings allocation detail values on the Detailed Savings Allocations sheet. You can enter values in the Savings percent fields only.
Savings Data	The Savings Data sheet displays data from the savings form header. The data in this sheet will be allocated into multiple detail rows based on the breakdown percentages. This sheet is read-only.
Detailed Savings Allocations	The Detailed Savings Allocation sheet contains the savings allocation detail rows. Savings values are calculated using the percentages specified in the Breakdown Percentage and Savings Data sheets. All the formula and dimension cells are read-only.

    > ⓘ Note
    >
    > The **Department**, **Regions**, **Client**, **Commodity**, and **Supplier** fields are pre-populated from the header section of the savings form and are not displayed in Excel in drop-down pick lists.
    >
    > Values for fields defined by flex-master data (FMD) cannot be imported from Excel files. Savings form Excel templates have empty values for FMD fields. If you manually enter values for FMD fields in the Excel file, the file cannot be imported.

4. Edit the Excel file. When you have finished entering and verifying values, save the file to your computer desktop.
5. Upload the Excel file.
    - If you're adding initial savings allocation values, return to the **Savings Form** page. Under the **Detailed Savings Allocations** tab, choose **Allocate Savings**. From the **Create Savings Allocation** page, go to **Step 3**. Upload your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).
    - If you're replacing savings allocation values, choose **Excel Export/Import** from the **Detailed Savings Allocation** tab of the savings form. From the **Import Detailed Savings Allocation** page, go to **Step 2**. Upload your Excel file (browse for the file, enter the file path, or drop a file icon in the drag-and-drop box).

Results

The values from your Excel file are loaded as to Savings Allocation Details. Only values that can be edited on the **Savings Form** page are imported. You can manually modify the imported values in the **Detailed Savings Allocation** area on the **Savings Form** page.

Task overview: Savings Forms in Guided Sourcing [page 166]

Related Information

Savings Form Sections [page 168]
Using Savings Forms in Guided Sourcing [page 173]
Using Savings Forms in Guided Sourcing [page 173]

Sourcing Library, Content Documents, and Guided Sourcing

The **sourcing library** (also called the **content library**) can contain **content documents** with instructions, specifications, legal terms, or other content to be used in multiple sourcing project. The sourcing library can also contain event content, such as items or event attachments to be used in multiple events.

Creating a Content Document in a Guided Sourcing Full Project [page 178]

Copying Content from a Content Document to a Guided Sourcing Event [page 180]

Parent topic: Documents and Reusable Content in Guided Sourcing Projects and Events [page 145]

Related Information

Available Actions in the Events and other documents Table in Guided Sourcing Full Projects [page 146]
Creating a Folder in a Guided Sourcing Full Project [page 151]
Uploading a Document to a Guided Sourcing Full Project [page 152]
Setting Access Controls for Guided Sourcing Full Projects, Project Documents, and Events [page 154]
Viewing a Document's or a Folder's Details, Associated Tasks, and Version History in a Guided Sourcing Full Project [page 156]
Replacing a Document in a Guided Sourcing Full Project [page 158]
Editing a Document's or a Folder's Details in a Guided Sourcing Full Project [page 160]
Copying an Existing Document into a Guided Sourcing Full Project [page 161]
Creating a Form in a Guided Sourcing Full Project [page 163]

Creating an Analytical Report in a Guided Sourcing Full Project [page 165]
Savings Forms in Guided Sourcing [page 166]
Working with Sourcing Library Content

Creating a Content Document in a Guided Sourcing Full Project

Use this procedure to create a content document in a guided sourcing full project. Later when you create a guided sourcing event, you can directly copy content from this content document to the event, without having to add each item individually.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You're the project owner.
- You have project owner capabilities for the project.

Context

While creating a content document, you can manually add content, import content from an Excel file, or copy content from the content finder to the content document.

Procedure

1. Open a guided sourcing full project.
2. From the **Events and other documents** panel, choose **Create** > **Document**.

   A popup opens, showing the types of documents you can create and asking you which type of document you want to create.
3. Select **Content document** and click **Next**.

   The **Create content document** page appears.
4. Set general information for this content document, including **Name**, **Description**, **Commodities**, and **Regions**.
5. Click **Create** in the upper-right corner.

   A content document opens. It also appears in the document tableImporting Event Data from a Standard Excel Document on the **Events and other documents** panel.
6. Add content to the content document by using one of the following methods:

Method	Procedure
Manually add content.	Manually add content under the **Items that need quotes** and **Questions, requirements, and attachments** panels. For more information, refer to Item That Need Quotes (Lots and Line Items) in Guided Sourcing and Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events .
Import content from an Excel file.	Import content from an Excel file in SAP Ariba standard format. For more information, refer to Importing Event Data from a Standard Excel Document .
Copy content from the content finder.	1. Click the more icon (...) in the upper-right corner of the content document and select **Add content from finder**. 2. On the **Add content from finder** page, search for the document to copy from and click the document name. The **Select content** page appears. 3. Click **Add all content** in the upper-right corner of the page to copy all content; alternatively, select specific content from the displayed panels, and then click **Select** in the upper-right corner of the page to copy only the specific content. **Note** You can also access the content finder from the **Items that need quotes** and **Questions, requirements, and attachments** panels of the content document. • From **Items that need quotes**, choose **Add** > **Items from finder** to copy items, lots, or sections to the content document. • From **Questions, requirements, and attachments**, choose **Add** > **Content from finder** to copy questions, requirements, or attachments to the content document.

Task overview: Sourcing Library, Content Documents, and Guided Sourcing [page 177]

Related Information

Copying Content from a Content Document to a Guided Sourcing Event [page 180]
Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324]

Copying Content from a Content Document to a Guided Sourcing Event

Use this procedure to copy a content document in a guided sourcing full project in whole or in part to a guided sourcing event to quickly create the event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You're the project owner.
- You have project owner capabilities for the project.

Context

To copy content from a content document to a guided sourcing event, you can go to the document table, the content document, or the content finder for copying.

Procedure

1. Open a guided sourcing full project.
2. Go to the **Events and other documents** panel.
3. Create a guided sourcing event, as described in Creating a Guided Sourcing Event in a Full Project [page 89].
4. Copy content from a content document to this event by using one of the following methods:

Method	Procedure
Go to the document table.	1. In the document table under the **Events and other documents** panel, find the content document you want to copy from. 2. Check the box next to the content document and click **Copy** above the table, or click the content document's more icon (···) and select **Copy to sourcing event**. 3. Search for the guided sourcing event, select it, and click **Copy**. All content in the content document is copied to the event.
Go to the content document.	1. In the document table under the **Events and other documents** panel, find the content document you want to copy from. 2. Click the document to open it. 3. Click the more icon (···) in the upper-right corner of the content document and select **Copy to sourcing event**. 4. Search for the guided sourcing event, select it, and click **Copy**. All content in the content document is copied to the event.

Method	Procedure
	To copy only specific content, go to the **Items that need quotes** and **Questions, requirements, and attachments** panels, select the specific content and choose **Copy** > **Copy to soucing event**.
Go to the guided sourcing event and access the content finder.	1. In the document table under the **Events and other documents** panel, find the sourcing event. 2. Click the event to open it. 3. Click the more icon (•••) in the upper-right corner of the event page and select **Event settings** > **Add content from finder**. 4. On the **Add content from finder** page, search for the content document to copy from and click the document name. The **Select content** page appears. 5. Click **Add all content** in the upper-right corner to copy all content from the content document; alternatively, select specific content on the displayed panels, and then click **Select** in the upper-right corner of the page to copy only the specific content. **Note** You can also access the content finder from the **Items that need quotes** and **Questions, requirements, and attachments** panels on the event editing page. • From **Items that need quotes**, choose **Add** > **Items from finder** to copy items, lots, or sections from the content document to the event. • From **Questions, requirements, and attachments**, choose **Add** > **Content from finder** to copy questions, requirements, or attachments from the content document to the event.

Task overview: Sourcing Library, Content Documents, and Guided Sourcing [page 177]

Related Information

Creating a Content Document in a Guided Sourcing Full Project [page 178]
Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324]

Tasks in Guided Sourcing Projects

Tasks assign actions to be completed, such as approving events for publication or approving awards. You can optionally organize tasks in full sourcing projects into phases. Phases can define and enforce the order in which tasks must be completed and can be scheduled to automatically recur.

A full sourcing project can contain the following types of tasks:

- To-Do: Use a to-do task to assign and record general project actions, including actions completed outside of SAP Ariba Sourcing.
- Review: Use a review task to ask users to edit or comment on a project document or event.
- Approval: Use an approval task to request approval for a document or event from relevant stakeholders.
- Notification: Use a notification task to send a one-time or repeating email reminder to users.

Template authors can configure tasks so that users are automatically assigned as approvers (or reviewers) based on project field values. For example, you can configure approvers based on the **Regions** for a project. For more information, see Approval Rule Conditions in the Project Template Guide.

Review and approval tasks are always associated with a project document or event (the item being reviewed or approved). To-do and notification tasks can optionally be associated with a project document or event. In addition, you can create a task for an entire full sourcing project (Creating a Task for an Entire Guided Sourcing Full Project [page 188]).

Tasks for Events

Guided sourcing provides the following tasks exclusively for events (event-only tasks):

- **Approval for Publish**: This task prevents event contents from being published until the contents are approved. If present, this task automatically starts when a team member submits an event for publishing.
- **Approval for Award**: This task prevents an award from being created until the award scenario is approved. If present, this task automatically starts when a team member submits a scenario for an award.
- **Review for Team Grading**: This task is available only in events with team grading enabled (events with the **Enable scoring on participant responses** event rule enabled). The **Review for Team Grading** task allows team graders to review the supplier responses to event questions and submit their grades. If present, this task automatically starts when an event changes to the **Review responses** state and the review flow contains reviewers.
- **Approval for Team Grading**: This task is available only in events with team grading enabled and that contain a **Review for Team Grading** task. The **Approval for Team Grading** task allows grade approvers to approve or deny grades assigned by team graders. If present, this task automatically starts when when the **Review for Team Grading task** is completed.
- **Approval for Timing Change**: This task prevents changes in the timing of guided sourcing events from taking effect until the changes are reviewed and approved by authorized persons (including both internal and external approvers). If present, this task automatically starts when an event owner or any other user with privileges to edit the event performs an action to change the timing of the event. Actions that trigger the **Approval for Timing Change** task include the following:

- Extend the event time.
- Reduce the event time.
- Stop an event.
- Reopen an event.
- Pause an event.
- Resume an event.
- Close an event.
- Cancel an event.

For events in single-event projects, event-only tasks can be configured only in the event template; the **Approval for Timing Change** task is added using the **Enable approval for event timing change** event rule. For events in a full sourcing project, **Approval for Publish**, **Approval for Team Grading**, and **Approval for Timing Change** tasks can be configured only in the project template, but users can manually add **Approval for Award** and **Review for Team Grading** tasks for an event from the full project.

See Managing Event Tasks in Guided Sourcing [page 478] for more information about event-only tasks.

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]

Creating a Task for an Entire Guided Sourcing Full Project [page 188]

Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]

Editing a Task's Details in a Guided Sourcing Full Project [page 191]

Deleting a Task in a Guided Sourcing Full Project [page 193]

Cancelling an Optional Task in a Guided Sourcing Full Project [page 194]

Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196]

Creating a Custom Notification Profile for a Task in a Guided Sourcing Full Project [page 198]

Viewing a Task's Comments and Activity History in a Guided Sourcing Full Project [page 200]

Commenting on a Task in a Guided Sourcing Full Project [page 201]

Using To-Do Tasks in Guided Sourcing Full Projects [page 203]

Review Tasks in Guided Sourcing Full Projects [page 208]

Approval Tasks in Guided Sourcing Full Projects [page 216]

Notification Tasks in Guided Sourcing Full Projects [page 227]

Completing Tasks in Guided Sourcing [page 232]

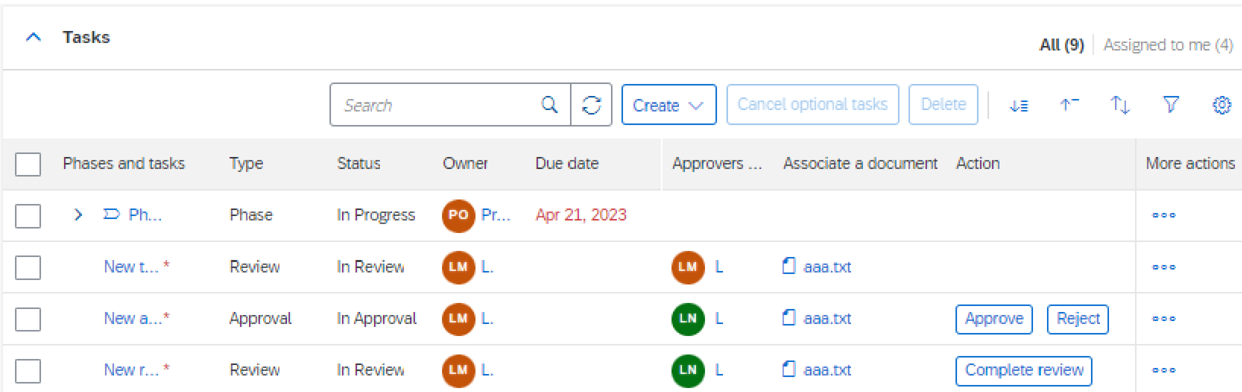
Related Information

Phases in Guided Sourcing Full Projects [page 240]

Available Actions in the Tasks Table in Guided Sourcing Full Projects

As part of the improved project workflow, guided sourcing full projects allow you to complete most task and phase actions directly from the **Tasks** panel.

Example **Tasks** panel in a guided sourcing full project:



If you can act on a task, the **Action** column contains buttons you can use to complete the action. For example, **Approve** and **Reject** buttons are available if you're the current (active) approver for a task.

The following tables describe useful task- and phase-related actions available in the **Tasks** panel:

- Viewing, Editing, and Moving
- Starting, Completing, and Canceling
- Creating and Deleting

Your capabilities in a project control the task-related actions available to you.

Project owners, team members with project owner capabilities, and task owners can complete most of the task-related actions, although certain actions, like approving or reviewing a document, are limited to users specified in the task.

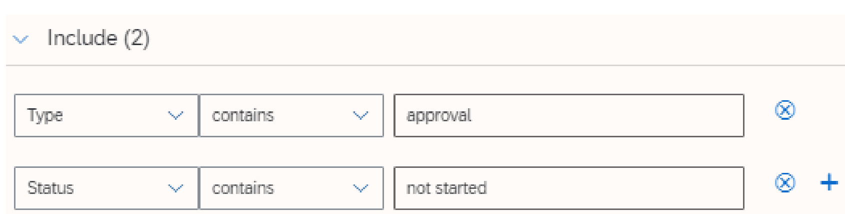
To review the specific prerequisites for certain actions, refer to Tasks in Guided Sourcing Projects [page 182].

Viewing, Editing, and Moving

To Complete This Action,	Follow These Steps
View a task's or phase's details	Select a task's or phase's name.
Preview a task's associated document or view the details of a task's associated folder	Select the document's or folder's name in a tasks's **Associated document** column. If a document's file type isn't supported for previewing, the document downloads automatically.

To Complete This Action,	Follow These Steps

Edit a task or phase's name, owner, due date, or associated document from the **Tasks** table	Hover over one of the fields, select the edit icon ( ), then complete one of the following actions:
	• When editing the name, enter your changes in the popup's text box and either press Enter or select an area on the page outside of the popup.
	• When editing the **Owner** field, choose the radio button for the user or group who will be the new owner and select **Save**.
	• When editing the **Due date** field, choose a specific date or enter an interval in the popup's text box, then either press Enter or select an area on the page outside of the popup.
	• When editing the **Associated document** field, complete one of the following actions:
	    • Choose one of the options to associate a new document or replace an existing one, then use the popup's prompts to locate the appropriate file and associate it with the task.
	    • Choose **Remove this document** to remove the associated document.

Edit a task's or phase's detail fields	Select a task's or phase's **More actions** icon ( ) and choose **Edit task** or **Edit phase**.
Move a task or phase to another location in the **Tasks** table	Select and hold on any part of a task's or phase's table row, then drag it to the desired location in the table. In addition to changing the order of the table's tasks and phases, you can add a task to or remove it from a phase by dragging the task into or out of the phase.
Expand or collapse all phases to show or hide the tasks they contain	Select the expand ( ) or collapse ( ) icon.
Sort tasks and phases	Select the sort icon ( ) to sort entries. For example, you can sort entries by **Due date** in **Ascending** order.
Filter entries shown	Select the filter icon ( ) and create one or more filtering statements that include or exclude entries based on column values. For example, you can show only approval tasks with the status **Not Started**:  When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Show or hide columns	Select the gear icon ( ) to open a selector to choose the columns to show or hide.

Starting, Completing, and Canceling

To Complete This Action,	Follow These Steps
Start a task	Depending on the task type, select the appropriate action button in a task's table row: • To start a to-do task, select **Set to started** • To start a notification task, select **Start schedule** • To start an approval or review task, select **Submit**
Start a recurring phase	In a recurring phase's table row, select **Start recurrence**.
Complete a task	Depending on the task type, select the appropriate action button in a task's table row: • To indicate that a to-do task is complete, select **Set to complete** • To complete an approval task as an approver, select **Approve** or **Reject** • To complete a review task as a reviewer, select **Complete review** • To complete a review task as the task owner, select **Set to complete** • To complete a notification task that requires manual complete, select **Set to complete** For additional actions related to approval, review, and notification tasks, refer to Review Tasks in Guided Sourcing Full Projects [page 208], Approval Tasks in Guided Sourcing Full Projects [page 216], and Notification Tasks in Guided Sourcing Full Projects [page 227].
Cancel an optional task	Check the box next to an optional task's name and then select **Cancel optional tasks**. To cancel multiple optional tasks at the same time, check the boxes for more than one task. For more on canceling optional tasks, refer to Cancelling an Optional Task in a Guided Sourcing Full Project [page 194].
Stop or restart a recurring phase	Locate an instance of the recurring phase and select the instance's **More actions** icon (•••), then choose **Show recurrence**. In the master recurring phase's table row, select **Stop recurrence** or **Restart recurrence**.

Creating and Deleting

To Complete This Action,	Follow These Steps
Create a new task or phase	Select **Create**, then choose **Phase** or **Task**.
Create a new subphase or task inside an existing phase	Select an existing phase's **More actions** icon (•••) and choose **Create subphase** or **Create task**.

To Complete This Action,	Follow These Steps
Manually create a new instance of a recurring phase	Locate an instance of the recurring phase and select the instance's **More actions** icon (•••), then choose **Show recurrence**. Select the master recurring phase's **More actions** icon (•••), then choose **Create new occurrence**. ⓘ Note This action is only available for in-progress recurring phases.
Delete a task or phase that wasn't in-herited from the project template	Check the box next to the name of a task or phase and then select **Delete**. To delete multiple items at the same time, check the boxes for more than one task or phase. For more on deleting tasks, refer to Deleting a Task in a Guided Sourcing Full Project [page 193].

Parent topic: Tasks in Guided Sourcing Projects [page 182]

Related Information

Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
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Documents and Reusable Content in Guided Sourcing Projects and Events [page 145]
Tasks in Guided Sourcing Projects [page 182]

Creating a Task for an Entire Guided Sourcing Full Project

Use this procedure to create a task for an entire guided sourcing full project. Use project-level tasks to collect project approvals or reviews from stakeholders or track actions that affect the entire project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

In addition to tasks associated with individual documents or folders in a project, you can also create tasks associated with an entire guided sourcing project. These tasks can be useful if your project needs to be reviewed or approved by outside stakeholders or if you need to track actions that affect the whole project.

Tasks created for the entire project display in the **Tasks** table with the rest of the project's tasks and phases. If you plan to use project-level tasks, it can be useful to group these tasks into their own phase so they're easily identifiable.

In a guided sourcing full project, you can create to-do, review, approval, and notification tasks for the project. These tasks function the same as tasks created for individual documents or folders.

> **Note**
>
> Setting the **Reviewer can edit** field to **Yes** in a project-level review task doesn't allow users in the task's approval flow to edit the project. However, reviewers can replace any document in the project if this setting is enabled.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, select **Create** > **Task**.
3. Enter a name for the task.
4. **Optional:** If necessary, choose a new owner for the task.
5. **Optional:** Specify a due date for the task.

   > **Note**
   >
   > To-do, approval, and review tasks must have a due date to trigger pending and overdue notifications.

6. In the **Associated document** panel, select **Associate this project**.
7. **Optional:** In the **Task type and process** panel, choose a new task type.

   The default type is **To do**.

   a. If you choose **Approval** or **Review** as the task type, use the **Approval flow** area to add approvers or reviewers.
8. **Optional:** Complete any additional fields as necessary.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
9. Depending on the task type, select **Create**, **Submit**, or **Start schedule**.

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Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
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Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Creating an Approval Task in a Guided Sourcing Full Project [page 217]

Viewing the Details of a Task or Phase in a Guided Sourcing Full Project

Use this procedure to view the details of a task or phase in a guided sourcing full project. Users who meet a project's access control requirements can open a read-only version of a task or phase to view its full detail fields.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet any access control requirements for the project.

Context

View the details of a task or phase to see fields not visible in the **Tasks** table, such as **Description**, **Milestone** (tasks only), **Recurrence schedule** (phases only), and other fields specific to the distinct task types. Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for task and phase field descriptions.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, select the name of a task or phase.

Results

The task or phase opens in a read-only view.

Task overview: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Editing a Task's Details in a Guided Sourcing Full Project [page 191]

Editing a Task's Details in a Guided Sourcing Full Project

Use this procedure to customize an inherited task to match your use case, or update an existing task to meet new project requirements or an adjusted timeline.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- The task must be in a not-started or in-progress status.

Context

You can edit or complete the detail fields of tasks created manually for the project and tasks inherited from the project template. You might need to edit an inherited task's details if your company's templates include tasks that you customize to match your use case.

> ⓘ Note
>
> You can't edit some fields on a task inherited from the project template, even when the task is in an editable status. For example, you can't make an inherited task that is required into an optional task. You also can't make an inherited task that is optional into a required task.

You can edit the following task fields directly in the **Tasks** table:

- **Name**
- **Owner**

- **Due date**
- **Associated documents**

To edit a field inline in the table, hover your cursor over the field's name and select the edit icon ( ).

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select a task's **More actions** icon ( ) and choose **Edit task**.

   The task opens with the **Task details** panel in edit mode.
3. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.

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Completing Tasks in Guided Sourcing [page 232]

Deleting a Task in a Guided Sourcing Full Project

Use this procedure to delete manually created tasks but not tasks inherited from the project template.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- The task must be one that is created manually in the project, not a task inherited from the project template.
- The task's status must be **Not Started**.

Context

You can delete a manually created task in a guided sourcing full project as long as the task's status is **Not Started**.

If the task you'd like to delete is in-progress or completed, you must return it to the **Not Started** status before you can delete it. To return a task to the **Not Started** status, you either reset it or create a new round for it, depending on the task type.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, check the check box for the task you want to delete.

   > ⓘ Note
   >
   > Delete multiple manually created tasks and phases at once by checking more than one check box.
3. Select **Delete**.

Task overview: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
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Cancelling an Optional Task in a Guided Sourcing Full Project

Use this procedure to cancel an optional task in a guided sourcing full project. Since an optional task's status doesn't affect phase or project completion, you can cancel an optional task without impacting a project's progression.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- The task's status must be **Not Started**.
- The task must be optional.

Context

You can cancel optional tasks when needed, as your business processes allow. Required tasks can't be canceled and must be completed to complete a project.

You only have the choice to cancel an optional task when its status is **Not Started**. If the task you'd like to cancel is in-progress or completed, you must return it to the **Not Started** status before you can cancel it. To return a task to the **Not Started** status, you either reset it or create a new round for it, depending on the task type.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, check the check box for the task you want to cancel.

> ⓘ Note
>
> Cancel multiple optional tasks at once by checking more than one task's check box.

3. Select **Cancel optional tasks**.
4. **Optional:** Edit the optional comment text and attach any documents as necessary.
5. Select **Cancel optional tasks**.

Next Steps

To complete a canceled optional task, reset the task's status to **Not Started** by selecting **Reset**.

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Related Information

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Replacing a Task's Associated Document in a Guided Sourcing Full Project

Use this procedure to replace a document from an associated task, which is one way to create a new document version in guided sourcing full projects.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must also meet one of the following requirements:
  - You're the task owner.
  - You're the project owner.
  - You have project owner capabilities for the project.
  - You're a reviewer for a review task that allows reviewers to edit the document.

Context

The most common reason to replace a document is to upload a new version of it. You can replace a document from a task associated with the document as well as directly in the **Events and other documents** table.

For more on replacing a document in the **Events and other documents** table, refer to Replacing a Document in a Guided Sourcing Full Project [page 158].

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, navigate to the **Associate a document** column for the task. Hover over the current document name and select the edit icon ( ) and choose one of the following options:
   - **Choose an item from the content finder** to replace the associated document with another document from the current project or elsewhere in your site.
   - **Upload a new document** to replace the associated document with a document from your computer.
   - **Associate this project** to associate the current project with the task. For example, you can create a review task for the project.
   - **Remove this document** to remove the associated document from the task. Removing the associated document from an approval or review task changes the task to a to-do task.
3. Locate the file you'd like to use, either in the content finder or your computer's file directory:
   - In the content finder, select **Current workspace** to browse or search the current project's documents, or select **All workspaces** to browse or search the contents of templates, knowledge areas, and other projects. After locating the correct document, choose its radio button and select **Next**.

- In your computer's file directory, choose the desired file and then select the appropriate button to continue. For example, on a computer running Microsoft Windows, select **Open**.

4. Choose an answer for the question **Do you want to save this as a new version of the document?**.
    - Choose **Yes** to overwrite the existing document (version n) with a new version (version n+1).
    - Choose **No, keep the existing version number** to overwrite the existing document (version n) with an edited version of the current version. With this choice, the document's version displays in the user interface as **vn (editing)**.
5. Select **Replace**.

Task overview: Tasks in Guided Sourcing Projects [page 182]

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Creating a Custom Notification Profile for a Task in a Guided Sourcing Full Project

Use this procedure to create a custom notification profile for a task in a guided sourcing full project. Customizing a task's notification profile allows you to choose what notifications the task triggers and which users receive the notifications.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- The task must be one that is created manually in the project, not a task inherited from the project template.
- The task must be in a not-started or in-progress status.

Context

When you create a new task in a project, you can choose a notification profile that specifies the following notification settings:

- the time intervals for sending notifications for pending and overdue tasks
- whether or not SAP Ariba sends a notification message when the task is complete
- the recipients for each notification type

Your SAP Ariba solution includes a default notification profile that is available in all project templates. When creating a new task in a project, you can use the default notification profile, use a notification profile from the project template, or specify notification settings that apply to the current task only.

> ⓘ Note
>
> A custom notification profile created in a task only applies to that task. To make additional notification profiles available on all tasks created in a project, you must add new profiles to the project template. For more on creating notification profiles for project templates, see Creating Notification Profiles.

The default notification profile has the following settings:

- Pending notifications
  - Start date: Sent 30 days before the task due date
  - Reminder interval: Send reminders every 7 days after the first notification
  - Recipients: Task owner, task participants (task owner, original owner, approvers, and observers)
- Overdue notifications
  - Start date: Sent every 2 days after the task due date
  - Reminder interval: Send reminders every 2 days after the first notification
  - Recipients: Task owner, task participants (task owner, original owner, approvers, and observers)

- Task complete notification
  - Sent when the task is complete.
  - Recipients: Task participants (task owner, original owner, approvers, and observers)

> ⓘ Note
>
> You can globally manage what notifications you receive from project tasks by enabling or disabling specific notification types in your account's **Email Notification Preferences** area. For information on managing your email notification preferences, refer to About Setting Email Notification Preferences.

Procedure

1. In the project page's header, select **Tasks**.
2. From the **Tasks** panel, create a new task or open an existing non-template task for editing.
3. In the **Task details** panel, select **Show more**.
4. Select the **Notification profile** dropdown, and choose **Create a custom profile just for this task**.
5. Customize the task's notification profile as needed by enabling or disabling notification types, changing the notification intervals, or choosing different recipients.
6. In the upper-right corner of the **Task details** panel, select **Save** to apply your changes or **Cancel** to discard them.

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Viewing a Task's Comments and Activity History in a Guided Sourcing Full Project

Use this procedure to view the **Comments and activity history** panel, which records important task actions and comments or attachments added to the task by participants or other users.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet any access control requirements for the project.

Context

A task's **Comments and activity history** panel records entries for important task-related actions, such as submitting an approval or review task. In addition to the name of the user who completed the action, the date and time of the action, and the task's round (if applicable), each entry also displays any comments or attachments added by the user.

In the **Comments and activity history** panel, you can respond to entries created by task actions and also post new comments.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select a task's name to open its details page.
3. In the task details page's header, select **Comments and activity history**.

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Completing Tasks in Guided Sourcing [page 232]
Commenting on a Task in a Guided Sourcing Full Project [page 201]

Commenting on a Task in a Guided Sourcing Full Project

Use this procedure to communicate with task participants in the **Comments and activity history** by responding to a task action or creating a new comment thread.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet any access control requirements for the project.

Context

In the **Comments and activity history** panel, you can respond to entries created by task actions and also post new comments.

You can only edit or delete a comment if it doesn't have any direct replies. You can't delete a comment or reply from another user, even if you're the project or task owner.

> Note
>
> Task participants only receive a notification if the task's **Notification on comment** setting is enabled.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select a task's name to open its details page.

3. In the task details page's header, select **Comments and activity history**, then complete one of the following actions:
    - Create a new comment thread by entering your text in the comment field and selecting the **Send** icon ( ).
    - Post a reply in an existing comment thread by selecting a comment's **More actions** icon (•••) and choosing **Reply**.

    Include an attachment with a comment or reply by selecting **Attach a file** and choosing the desired file from your computer.
4. **Optional:** Change or remove your comment by selecting its **More actions** icon (•••) and choosing **Edit** or **Delete**.

    > Note
    >
    > You can only edit or delete a comment when it doesn't have any direct replies.

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Using To-Do Tasks in Guided Sourcing Full Projects

This procedure demonstrates how to use to-do tasks to assign and record general project actions, including actions completed outside of SAP Ariba Sourcing.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create and edit tasks in the project.

    > Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides task creation and editing capabilities for a project.

  - You're the project owner.
  - You have project owner capabilities for the project.

Context

A to-do task works best for a simple activity that doesn't require two-way communication or a cyclical workflow. For instance, you might use a to-do task to remind a user to complete some action outside of the project, such as compiling a list of potential business contacts. After you complete a to-do task's related activity, you manually set it to complete.

You can associate a to-do task with a project, document, or folder. However, to-do tasks don't support reviewing and incorporating document changes from other users, so this type of to-do task works best as a placeholder for an additional action, such as editing or publishing the associated document.

Although to-do tasks don't support multiple rounds, you can reset a to-do task to **Not Started** after setting it to complete.

Typically, the to-do task's owner is the only user who works on the task, but a project owner can also start a to-do task and set it to complete, if necessary.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, complete one of the following actions:
   - Create a standalone to-do task by selecting **Create** > **Task**.

- Create a task inside a phase by selecting the phase's **More actions** icon ( ) and choosing **Create task**.

> Note
>
> You can also add a task to a phase in the **Tasks** panel by dragging the task into the phase. Use the same process to remove a task from a phase.

3. Enter a name for the task.
4. **Optional:** If necessary, choose a new owner for the task.
5. **Optional:** Specify a due date for the task.

> Note
>
> To-do, approval, and review tasks must have a due date to trigger pending and overdue notifications.

6. **Optional:** Complete any additional fields as necessary.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
7. Use the options in the **Associated document** panel to associate a document with the task by completing one of the following actions:
   - Select **Associate from content finder** to associate a document already contained in the current project.
   - Select **Associate this project** to associate the task with the whole project.
   - Drag a new document into the document upload area, or click **browse** to choose a document from your computer.

   After you associate a document with a to-do task, you can also convert the task to an approval or review task if needed.

> Note
>
> You can make the following changes to an associated document before starting a task:
>
> - Replace the associated document with a different document by selecting the replace icon ( ) and choosing and option.
> - Remove the associated document by selecting the cancel icon ( ).

8. In the **Task type and process** panel, select **To do**.
9. Select **Create**.

Next Steps

Start [page 233] the task.

Task overview: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
Editing a Task's Details in a Guided Sourcing Full Project [page 191]
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Commenting on a Task in a Guided Sourcing Full Project [page 201]
Review Tasks in Guided Sourcing Full Projects [page 208]
Approval Tasks in Guided Sourcing Full Projects [page 216]
Notification Tasks in Guided Sourcing Full Projects [page 227]
Completing Tasks in Guided Sourcing [page 232]
Editing a Task's Details in a Guided Sourcing Full Project [page 191]

Associating a Document with an Existing To-Do Task in a Guided Sourcing Full Project

This procedure demonstrates how to use a document to-do task to remind a user to complete an action related to the document, such as editing or publishing it.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create and edit tasks in the project.

    > ⓘ Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides task creation and editing capabilities for a project.

  - You're the project owner.
  - You have project owner capabilities for the project.
- The task must be one that is created manually in the project, not a task inherited from the project template.
- The task's status must be **Not Started**.

Context

You can associate a to-do task with a project, document, or folder. However, to-do tasks don't support reviewing and incorporating document changes from other users, so this type of to-do task works best as a placeholder for an additional action, such as editing or publishing the associated document.

You can't associate a document with a to-do task inherited from the project template. To associate a document with an existing manually created to-do task, the task must be in the **Not Started** status. If the task is in progress or completed, you must reset it to the **Not Started** before you can associate a document.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the name of the task you'd like to associate with a document.
3. On the task page, go to the **Associated document** panel and do one of the following:
    - Select **Associate from content finder** to associate a document already contained in your site.
    - Select **Associate this project** to associate the task with the whole project.
    - Drag-and-drop a new document into the document upload area, or click **browse** to choose a document from your computer.

> Note
>
> You can make the following changes to an associated document before starting a task:
>
> - Replace the associated document with a different document by selecting the replace icon ( ) and choosing and option.
> - Remove the associated document by selecting the cancel icon ( ).

Results

The system changes the to-do task to a document to-do task associated with the document you selected.

Resetting a To-Do Task in a Guided Sourcing Full Project

Use this procedure to reset a completed or canceled to-do task if you need to continue working on it or process it in a different way.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- The task's status must be **Complete** or **Canceled**.

Context

Resetting a completed or canceled to-do task changes the task's status to **Not Started**.

Some common reasons to reset a to-do task include the following:

- To continue working on a previously completed to-do task
- To cancel an optional to-do task
- To delete a manually created to-do task
- To associate a document with an already completed to-do task

> ⓘ Note
>
> Although to-do tasks don't use task rounds or document versioning, resetting a to-do task can impact the project workflow if the task is a predecessor for other tasks or phases. For more on task and phase predecessor dependencies, refer to Enforcing Task Order with Predecessor Tasks and Phases.

Procedure

1. In the project page's header, select **Tasks**.
2. Locate the to-do task in the **Tasks** panel and select the task's **Reset** button.

Results

The task's status reverts to **Not Started**.

Review Tasks in Guided Sourcing Full Projects

Review tasks enable reviewers to submit changes and comments for documents.

You use a review task to ask for changes to or comments on a project document. Depending on how you configure the task, reviewers can either edit the document directly or submit an edited version of the document when they complete their review. For a summary of review task features and the review task workflow, refer to What Are Review Tasks? and Management of Review Tasks.

In addition to document review tasks, an event can have a Review for team grading task [page 613], which enables multiple team members to grade supplier responses.

Parent topic: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
Editing a Task's Details in a Guided Sourcing Full Project [page 191]
Deleting a Task in a Guided Sourcing Full Project [page 193]
Cancelling an Optional Task in a Guided Sourcing Full Project [page 194]
Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196]
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Approval Tasks in Guided Sourcing Full Projects [page 216]
Notification Tasks in Guided Sourcing Full Projects [page 227]
Completing Tasks in Guided Sourcing [page 232]

Creating a Review Task in a Guided Sourcing Full Project

Use this procedure to create a review task in a guided sourcing full project. Use a review task to ask users to edit or comment on a project document or event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create and edit tasks in the project, and you own the document you're associating with the task.

    > ⓘ Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides task creation and editing capabilities for a project.

  - You're the project owner.
  - You have project owner capabilities for the project.

Context

You use a review task to ask for changes to or comments on a project document. Depending on how you configure the task, reviewers can either edit the document directly or submit an edited version of the document when they complete their review. For a summary of review task features and the review task workflow, refer to What Are Review Tasks? and Management of Review Tasks.

In addition to document review tasks, an event can have a Review for team grading task [page 613], which enables multiple team members to grade supplier responses.

To allow participants in the task's approval flow to edit the associated document, enable the task's **Reviewer can edit** setting. Using this setting allows reviewers to replace an associated document directly in the task, instead of requiring them to submit proposed changes separately.

To create a review task for multiple documents, group the documents in a folder and create a single task for the folder.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** table, select a document's or a folder's **More actions** icon (•••) and choose **Create task**.
3. Enter a name for the task.

4. **Optional:** If necessary, choose a new owner for the task.
5. **Optional:** Specify a due date for the task.

> ⓘ Note
>
> To-do, approval, and review tasks must have a due date to trigger pending and overdue notifications.

6. **Optional:** Complete any additional fields as necessary.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
7. In the **Task type and process** panel, select the **Task type** dropdown and choose **Review**.

   If you're creating a task for an event, you can also choose the **Review for team grading** task type.
8. In the **Approval flow** section's header, select **Add a step**.

   The **Add approvers** popup appears.
9. Choose an **Approver type**.

   Choosing **A user** allows you to add a single user or a custom list of users to the approval flow, while choosing **Anyone on the team** or **Everyone on the team** allows you to add a project group to the approval flow.
10. Select the **User/Team** field's value help icon ( ).
11. **Optional:** Search for a user or project group by entering all or part of the user's or the group's name in the search bar.
12. Check the check box for each desired user or choose the radio button for the appropriate project group and select **Select**.

    If you set the **Approver type** to **A user**, you can choose multiple users to create a custom approval group for the active approval step.
13. Select **Add**.
14. **Optional:** Add more approvers by selecting the new approval step's more actions icon (•••) and choosing one of the options, then repeating steps 9 through 13.

    The approval step's more actions menu contains the following options for adding additional approval steps:
    - **Add approvers before**, which adds a new serial approval step that is active before the current step.
    - **Add approvers after**, which adds a new serial approval step that is active after the current step.
    - **Add parallel approvers**, which adds a new approval step that is active at the same time as the current step.

    You can also edit the current approval step or remove it from the approval flow by choosing **Edit approver** or **Remove**.

    > ⓘ Note
    >
    > After adding an approval step, you can change its position or type (serial or parallel) by selecting the step and dragging it to the desired location in the approval flow.
15. In the **Task type and process** panel, select **Save**.
16. Select **Create**.

Task overview: Review Tasks in Guided Sourcing Full Projects [page 208]

Related Information

Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 211]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 213]
Processing Reviews for a Review Task in a Guided Sourcing Full Project [page 215]

Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project

Use this procedure to customize an inherited approval or review task to match your use case before starting it.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- To submit an approval or review task, the task's associated document must be in a status other than **Not Created** or **Not Edited**.

Context

You submit an approval or review task inherited from the project template to start the task's approval flow. Before submitting a task, you can also edit its detail fields, update the associated document, or add users to the approval flow. For instance, you might want to customize a generic task name or standardized approval flow to match the requirements of your particular project.

> ⚠ Restriction
>
> You can't edit some parts of inherited tasks, even when the task is in an editable status. Notably, the following restrictions apply to approval and review tasks:
>
> - If a user appears in the task's approval flow in the template, you can't remove them from the approval flow in your project.
> - If the template marked the task as required, you can't make it optional in your project.

For more on approval and review task workflows, refer to Management of Approval Tasks and Management of Review Tasks.

Procedure

1. In the project page's header, select **Tasks**.

   > ⓘ Note
   >
   > To submit the task without editing it, select the task's **Submit** button from the **Tasks** table.

2. In the **Tasks** table, select a task's **More actions** icon (•••) and choose **Edit task**.

   The task opens with the **Task details** panel in edit mode.
3. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
4. If necessary, use the **Task type and process** panel's **Approval flow** area to edit the users in the task's approval flow.

   > ⓘ Note
   >
   > - You can't remove approvers inherited from the project template.
   > - You can edit users in the task's approval flow, only if **Prevent project owners from adding users/ groups to review/approval tasks in guided sourcing** is set to **No** in the review and approval tasks in the guided sourcing full project template. For more information, refer to Prevent project owners from adding users/groups to review/approval tasks in guided sourcing.

5. In the task header, select **Submit**.

   You can also select **Close** to return to the project page without starting the task.
6. **Optional:** Edit the optional comment text and attach any documents as necessary.
7. Select **Submit** to start the task's approval flow.

Task overview: Review Tasks in Guided Sourcing Full Projects [page 208]

Related Information

Creating a Review Task in a Guided Sourcing Full Project [page 209]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 213]
Processing Reviews for a Review Task in a Guided Sourcing Full Project [page 215]

Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project

Use this procedure to create a new round for an approval or review task when the associated document or task requirements change.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- If the task is an approval task, its status must be **Approved**, **Denied**, or **Withdrawn**.
- If the task is a review task, its status must be **Reviewed**.

Context

Approval and review tasks use task rounds to track each iteration of a task's approval flow. Completing a particular task may require one or many rounds, depending on the input you receive from the task's participants.

Some reasons you might need to create a new task round include the following:

- An approver rejected an approval task and submitted document changes.
- You incorporated draft changes submitted by reviewers and want the reviewers to check the final document.
- You changed a task's associated document after starting the task and need to restart the approval flow with the correct version.
- You want to edit the task's approval flow.

To create a new round for an approval or review task from the **Tasks** table, the task must be in a completed (**Approved**, **Denied**, or **Reviewed**) or withdrawn status. You can also create a new round for a review task while it's in progress, but the option is only visible while viewing the task's details.

If you replace a document in the **Events and other documents** table while an associated approval or review task is in progress, the task typically remains associated with the previous document version until you create a new task round. However, if the task is a template task configured to synchronize approval flows with the latest document version, replacing the document automatically creates a new task round associated with the current document version. Refer to *Synchronizing approvals with the latest document version* in Multiple Task Rounds and Document Version Tracking for more on this type of configuration.

For more on approval and review task workflows, refer to Management of Approval Tasks and Management of Review Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. Select the task's **Create new round** button.

   The task details page opens, allowing you to edit task fields and settings before starting the new round.

   If the task is an optional task or a task created manually in the project, you can cancel or delete it from this page by using the choices in the task header's **More actions** menu (•••).
3. **Optional:** Complete any of the following actions as needed:
   - Edit the task details.
   - Replace the associated document.
   - Edit the approval flow.

   > ⓘ Note
   >
   > You can't remove approvers inherited from the project template.
4. In the task header, select **Submit**.

   You can also select **Close** to return to the project page without starting the task.
5. **Optional:** Edit the optional comment text and attach any documents as necessary.
6. Select **Submit** to start the task's approval flow.

Task overview: Review Tasks in Guided Sourcing Full Projects [page 208]

Related Information

Creating a Review Task in a Guided Sourcing Full Project [page 209]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 211]
Processing Reviews for a Review Task in a Guided Sourcing Full Project [page 215]
Management of Approval Tasks
Management of Review Tasks
Multiple Task Rounds and Document Version Tracking

Processing Reviews for a Review Task in a Guided Sourcing Full Project

After a review task's approval flow completes, review user comments and incorporate proposed changes into the task's document. This procedure demonstrates how to process reviews.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

After a review task's approval flow completes, you can complete any of the following actions:

- View comments from the reviewers.
- Publish the task's associated document.
  This only applies if the reviewed version of the document was still a draft.
- Create a new version of the task's associated document that incorporates the changes submitted by reviewers.

  > Note
  >
  > If the task was configured to allow reviewers to edit the document directly, they may have already created a new version of the associated document.
- Create a new task round [page 213] to continue collecting feedback.
- Set the task to complete.

For more on review task workflows, refer to Management of Review Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the task's name.
3. View comments from the approvers by selecting the details page header's **Comments and activity history** navigation tab.

   If an approver attached a revised file, you can download the file from the **Comments and activity history** panel.

   If the task's setting for **Reviewer can edit** is **Yes**, the approvers may have uploaded their changes to the project directly by replacing the associated document instead of attaching a file with their comments. You can view any changes to the document in the document details page's **Version history** panel.

4. **Optional:** Complete any of the following actions as necessary:
    - Manually incorporate changes to the task's document, then replace the document with the revised file.
    - Create a new round for the task [page 213].
5. If you don't need to make any changes or request additional reviews, select **Set to complete**, add any comments or attachments, and select **Set to complete** to complete the task.

Task overview: Review Tasks in Guided Sourcing Full Projects [page 208]

Related Information

Creating a Review Task in a Guided Sourcing Full Project [page 209]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 211]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 213]

Approval Tasks in Guided Sourcing Full Projects

Approval tasks can ensure that stakeholders approve events or project documents. For example, an **Approval for publish** task ensures that an event is approved before it's published.

You use approval tasks to request user approvals for documents and other project contents. For a summary of approval task features and the approval task workflow, refer to What Are Approval Tasks? and Management of Approval Tasks.

In addition to document approval tasks, you can also manually create award approval tasks for events in guided sourcing full projects. However, **Approval for publish**, **Approve for award**, and **Approval for Team Grading** tasks can only be added in an event template. For instructions on how to configure these tasks in an event template, refer to Configuring Event Templates for Guided Sourcing in Setting Up Guided Sourcing.

Creating an Approval Task in a Guided Sourcing Full Project [page 217]

Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]

Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]

Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 223]

Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]

Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]

Parent topic: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
Editing a Task's Details in a Guided Sourcing Full Project [page 191]
Deleting a Task in a Guided Sourcing Full Project [page 193]
Cancelling an Optional Task in a Guided Sourcing Full Project [page 194]
Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196]
Creating a Custom Notification Profile for a Task in a Guided Sourcing Full Project [page 198]
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Commenting on a Task in a Guided Sourcing Full Project [page 201]
Using To-Do Tasks in Guided Sourcing Full Projects [page 203]
Review Tasks in Guided Sourcing Full Projects [page 208]
Notification Tasks in Guided Sourcing Full Projects [page 227]
Completing Tasks in Guided Sourcing [page 232]

Creating an Approval Task in a Guided Sourcing Full Project

This procedure demonstrates how to use an approval task to request approval for a document or event from relevant stakeholders.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create and edit tasks in the project, and you own the document you're associating with the task.

    > ⓘ Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides task creation and editing capabilities for a project.
  - You're the project owner.
  - You have project owner capabilities for the project.

Context

You use approval tasks to request user approvals for documents and other project contents. For a summary of approval task features and the approval task workflow, refer to What Are Approval Tasks? and Management of Approval Tasks.

In addition to document approval tasks, you can also manually create award approval tasks for events in guided sourcing full projects. However, **Approval for publish**, **Approve for award**, and **Approval for Team Grading** tasks can only be added in an event template. For instructions on how to configure these tasks in an event template, refer to Configuring Event Templates for Guided Sourcing in Setting Up Guided Sourcing.

To create an approval task for multiple documents, group the documents in a folder and create a single task for the folder.

Procedure

1. In the project page's header, select **Events and other documents**.
2. In the **Events and other documents** table, select a document's or a folder's **More actions** icon (•••) and choose **Create task**.
3. Enter a name for the task.
4. **Optional:** If necessary, choose a new owner for the task.
5. **Optional:** Specify a due date for the task.

   > **Note**
   >
   > To-do, approval, and review tasks must have a due date to trigger pending and overdue notifications.
6. **Optional:** Complete any additional fields as necessary.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
7. In the **Task type and process** panel, select the **Task type** dropdown and choose **Approval**.

   If you're creating a task for an event, you can also choose the **Approval for award** task type.
8. In the **Approval flow** section's header, select **Add a step**.

   The **Add approvers** popup appears.
9. Choose an **Approver type**.

   Choosing **A user** allows you to add a single user or a custom list of users to the approval flow, while choosing **Anyone on the team** or **Everyone on the team** allows you to add a project group to the approval flow.
10. Select the **User/Team** field's value help icon ( ).
11. **Optional:** Search for a user or project group by entering all or part of the user's or the group's name in the search bar.
12. Check the check box for each desired user or choose the radio button for the appropriate project group and select **Select**.

    If you set the **Approver type** to **A user**, you can choose multiple users to create a custom approval group for the active approval step.
13. Select **Add**.
14. **Optional:** Add more approvers by selecting the new approval step's more actions icon (•••) and choosing one of the options, then repeating steps 9 through 13.

The approval step's more actions menu contains the following options for adding additional approval steps:

- **Add approvers before**, which adds a new serial approval step that is active before the current step.
- **Add approvers after**, which adds a new serial approval step that is active after the current step.
- **Add parallel approvers**, which adds a new approval step that is active at the same time as the current step.

You can also edit the current approval step or remove it from the approval flow by choosing **Edit approver** or **Remove**.

> ⓘ Note
>
> After adding an approval step, you can change its position or type (serial or parallel) by selecting the step and dragging it to the desired location in the approval flow.

15. In the **Task type and process** panel, select **Save**.
16. Select **Create**.

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]
Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 223]
Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]
Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]

Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project

Use this procedure to customize an inherited approval or review task to match your use case before starting it.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- To submit an approval or review task, the task's associated document must be in a status other than **Not Created** or **Not Edited**.

Context

You submit an approval or review task inherited from the project template to start the task's approval flow. Before submitting a task, you can also edit its detail fields, update the associated document, or add users to the approval flow. For instance, you might want to customize a generic task name or standardized approval flow to match the requirements of your particular project.

> ⚠ Restriction
>
> You can't edit some parts of inherited tasks, even when the task is in an editable status. Notably, the following restrictions apply to approval and review tasks:
>
> - If a user appears in the task's approval flow in the template, you can't remove them from the approval flow in your project.
> - If the template marked the task as required, you can't make it optional in your project.

For more on approval and review task workflows, refer to Management of Approval Tasks and Management of Review Tasks.

Procedure

1. In the project page's header, select **Tasks**.

   > ⓘ Note
   >
   > To submit the task without editing it, select the task's **Submit** button from the **Tasks** table.

2. In the **Tasks** table, select a task's **More actions** icon (•••) and choose **Edit task**.

   The task opens with the **Task details** panel in edit mode.
3. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
4. If necessary, use the **Task type and process** panel's **Approval flow** area to edit the users in the task's approval flow.

   > ⓘ Note
   >
   > - You can't remove approvers inherited from the project template.
   > - You can edit users in the task's approval flow, only if **Prevent project owners from adding users/groups to review/approval tasks in guided sourcing** is set to **No** in the review and approval tasks in the guided sourcing full project template. For more information, refer to Prevent project owners from adding users/groups to review/approval tasks in guided sourcing.

5. In the task header, select **Submit**.

   You can also select **Close** to return to the project page without starting the task.
6. **Optional:** Edit the optional comment text and attach any documents as necessary.

7. Select **Submit** to start the task's approval flow.

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 223]
Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]
Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]

Withdrawing an Approval Task in a Guided Sourcing Full Project

Use this procedure to withdraw an approval task in a guided sourcing full project. Withdrawing an approval task lets you stop the current approval flow and start a new approval round with an updated document version, new approvers, or different task settings.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

Withdrawing an approval task cancels the current round's approval flow and lets you edit the task before starting a new approval round. Some reasons you might want to withdraw an approval task include the following:

- You changed a task's associated document after starting the task and need to restart the approval flow with the correct version.
- You want to restart the task with different settings.
- You want to edit the task's approval flow.

You only have the option to withdraw an approval task when it's in progresss. After you withdraw an approval task, you must create a new round [page 213] to restart the approval flow. You can't resume the approval flow that was in-progress when you withdrew the task.

If you withdraw a required approval task, you must create a new round and complete the approval flow before you can set the project's state to complete. However, you can leave an optional approval task in the **Withdrawn** status and still set the project state to complete.

For more on approval task workflows, refer to Management of Approval Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the approval task's **Withdraw** button.
3. **Optional:** Edit the optional comment text and attach any documents as necessary.
4. Select **Withdraw**.

> ⓘ Note
>
> The **Withdraw** button does not appear when the parameter `Application.AQS.RemoveWithdrawOptionForExternalApprovalTasks` is set to **Yes**.

Results

The task is withdrawn, stopping the approval flow. You can restart the task's approval flow by creating a new round.

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 223]
Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]
Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 213]

Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project

Use this procedure to create a new round for an approval or review task when the associated document or task requirements change.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- If the task is an approval task, its status must be **Approved**, **Denied**, or **Withdrawn**.
- If the task is a review task, its status must be **Reviewed**.

Context

Approval and review tasks use task rounds to track each iteration of a task's approval flow. Completing a particular task may require one or many rounds, depending on the input you receive from the task's participants.

Some reasons you might need to create a new task round include the following:

- An approver rejected an approval task and submitted document changes.
- You incorporated draft changes submitted by reviewers and want the reviewers to check the final document.
- You changed a task's associated document after starting the task and need to restart the approval flow with the correct version.
- You want to edit the task's approval flow.

To create a new round for an approval or review task from the **Tasks** table, the task must be in a completed (**Approved**, **Denied**, or **Reviewed**) or withdrawn status. You can also create a new round for a review task while it's in progress, but the option is only visible while viewing the task's details.

If you replace a document in the **Events and other documents** table while an associated approval or review task is in progress, the task typically remains associated with the previous document version until you create a new task round. However, if the task is a template task configured to synchronize approval flows with the latest document version, replacing the document automatically creates a new task round associated with the current document version. Refer to *Synchronizing approvals with the latest document version* in Multiple Task Rounds and Document Version Tracking for more on this type of configuration.

For more on approval and review task workflows, refer to Management of Approval Tasks and Management of Review Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. Select the task's **Create new round** button.

   The task details page opens, allowing you to edit task fields and settings before starting the new round.

   If the task is an optional task or a task created manually in the project, you can cancel or delete it from this page by using the choices in the task header's **More actions** menu (•••).
3. **Optional:** Complete any of the following actions as needed:
   - Edit the task details.
   - Replace the associated document.
   - Edit the approval flow.

   > ⓘ Note
   >
   > You can't remove approvers inherited from the project template.
4. In the task header, select **Submit**.

   You can also select **Close** to return to the project page without starting the task.
5. **Optional:** Edit the optional comment text and attach any documents as necessary.
6. Select **Submit** to start the task's approval flow.

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]
Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]
Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]
Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]
Management of Approval Tasks
Management of Review Tasks
Multiple Task Rounds and Document Version Tracking

Processing Approvals for an Approval Task in a Guided Sourcing Full Project

This procedure demonstrates how to process approvals for an approval task in a guided sourcing full project. If everyone approves an approval task, the task completes automatically.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

If all the required users approve an approval task, the task's approval flow ends and the task automatically completes. Approved tasks don't require any additional action from you, but you can optionally complete any of the following actions:

- View comments or attachments from the approvers.
- Publish the task's associated document.
  This option only applies if the approved version of the document was still a draft.
- If you made changes to the document after starting the task, you can create a new task round [page 213] for the new document version.

For more on approval task workflows, refer to Management of Approval Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, complete one of the following actions:
   - Start a new approval round by selecting the task's **Create new round** button.

     > ⓘ Note

   - View comments from the approvers by selecting the task's name, then selecting the page header's **Comments and activity history** navigation tab.
   - Replace the task's associated document by selecting the task's name, then using the options in the **Associated document** panel's **Replace document** menu.

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]
Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 223]
Processing Rejections for an Approval Task in a Guided Sourcing Full Project [page 226]
Creating a New Round for an Approval or Review Task in a Guided Sourcing Full Project [page 213]
Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196]

Processing Rejections for an Approval Task in a Guided Sourcing Full Project

If an approver rejects an approval task, you can use this procedure to create a new approval round after incorporating any suggested document changes.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

If any user in an approval task's approval flow rejects the task, the approval flow stops and the task's status changes to **Denied**. To complete a rejected approval task, you must restart the approval flow by creating a new round [page 213]. If the rejecting approver added comments or an attachment with their rejection, you may want to incorporate changes to the task's associated document before starting the next round.

If an approver rejects a required approval task, you must create a new round and complete the approval flow before you can set the project's state to complete. However, you can leave an optional approval task in the **Denied** status and still set the project state to complete.

For more on approval task workflows, refer to Management of Approval Tasks.

Procedure

1. In the project page's header, select **Tasks**.

2. In the **Tasks** table, select the task's name.
3. **Optional:** View comments from the approvers by selecting the details page header's **Comments and activity history** navigation tab.

   If an approver attached a revised file, you can download the file from the **Comments and activity history** panel.
4. Complete any of the following actions as necessary:
   - Manually incorporate changes to the task's document, then replace the document with the revised file.
   - Create a new round for the task [page 213].

Task overview: Approval Tasks in Guided Sourcing Full Projects [page 216]

Related Information

Creating an Approval Task in a Guided Sourcing Full Project [page 217]
Editing and Submitting an Approval or Review Task Inherited from the Project Template in a Guided Sourcing Full Project [page 219]
Withdrawing an Approval Task in a Guided Sourcing Full Project [page 221]
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Processing Approvals for an Approval Task in a Guided Sourcing Full Project [page 225]

Notification Tasks in Guided Sourcing Full Projects

Notification tasks can send a one-time or repeating email reminder to users or suppliers.

You can use notification tasks to trigger one-time or repeating email notifications to users. These tasks provide a way to remind users to complete project-related actions that can't be easily managed with one of the other task types.

Creating a Notification Task in a Guided Sourcing Full Project [page 228]

Editing and Starting a Notification Task Inherited from a Template in a Guided Sourcing Full Project [page 230]

Cancelling a Notification Task's Schedule in a Guided Sourcing Full Project [page 231]

Parent topic: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]

Editing a Task's Details in a Guided Sourcing Full Project [page 191]
Deleting a Task in a Guided Sourcing Full Project [page 193]
Cancelling an Optional Task in a Guided Sourcing Full Project [page 194]
Replacing a Task's Associated Document in a Guided Sourcing Full Project [page 196]
Creating a Custom Notification Profile for a Task in a Guided Sourcing Full Project [page 198]
Viewing a Task's Comments and Activity History in a Guided Sourcing Full Project [page 200]
Commenting on a Task in a Guided Sourcing Full Project [page 201]
Using To-Do Tasks in Guided Sourcing Full Projects [page 203]
Review Tasks in Guided Sourcing Full Projects [page 208]
Approval Tasks in Guided Sourcing Full Projects [page 216]
Completing Tasks in Guided Sourcing [page 232]

Creating a Notification Task in a Guided Sourcing Full Project

This procedure demonstrates how to use a notification task to send a one-time or repeating email reminder to users.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You can create and edit tasks in the project.

    > Note
    >
    > Being a member of a project group that is assigned the **Active Team Member** role or the **Team Member with Limited Access** role provides task creation and editing capabilities for a project.

  - You're the project owner.
  - You have project owner capabilities for the project.

Context

You can use notification tasks to trigger one-time or repeating email notifications to users. These tasks provide a way to remind users to complete project-related actions that can't be easily managed with one of the other task types.

Like to-do tasks, associating a document with a notification task is optional. If your company enabled the site configuration parameter `Application.ACM.SendEmailAttachmentToNotificationRecipient`, a notification task that has an associated document includes a copy of the associated document in each notification email.

While the default configuration for a notification task allows the task to complete automatically after triggering its notification, you can also require one of the notification recipients to manually set the task to complete. If a notification task that requires manual completion isn't set to complete by the task's due date, it becomes overdue and begins triggering overdue notifications. The site configuration parameters `Application.ACM.OverdueNotifyTaskReminderBegin`, which has a default value of 7 days, and `Application.ACM.OverdueNotifyTaskReminderFrequency`, which has a default value of 2 days, control when an overdue notification task sends its first overdue notification and how frequently it sends subsequent overdue notifications. With the default configuration, an overdue notification task sends its first overdue notification 7 days after the due date, then sends another overdue notification every 2 days after that, until a recipient sets the task to complete.

For more information about notification tasks and the notification task workflow, refer to What Are Notification Tasks? and Management of Notification Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, select **Create** > **Task**.
3. Enter a name for the task.
4. **Optional:** If necessary, choose a new owner for the task.
5. Choose a due date.

   > Note
   >
   > The **Due date** field is required for notification tasks since it's used to calculate when to trigger each notification.

6. In the **Task type and process** panel, select the **Task type** field's dropdown menu and choose **Notification**.
7. In the **Task details** panel, select **Show more**.
8. Use the **Notification schedule** field's to set the interval (in days) before or after the task's due date to send each notification and configure notification frequency.

   The default frequency is **Once**. This option creates a task that sends a single notification. To create a notification task that sends recurring notifications, choose a frequency interval other than **Once**.
9. **Optional:** For recurring notification tasks, specify a final send date.

   > Note
   >
   > Recurring notification tasks occur regardless of a project's state, so SAP Ariba recommends always including a final send date.

10. **Optional:** Complete any additional fields as necessary.

    Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
11. Select **Start schedule**.

Task overview: Notification Tasks in Guided Sourcing Full Projects [page 227]

Related Information

Editing and Starting a Notification Task Inherited from a Template in a Guided Sourcing Full Project [page 230]
Cancelling a Notification Task's Schedule in a Guided Sourcing Full Project [page 231]

Editing and Starting a Notification Task Inherited from a Template in a Guided Sourcing Full Project

Use this procedure to edit and start a notification task inherited from a template in a guided sourcing full project. Before starting an inherited notification task, you can adjust its settings to match the requirements of your project timeline.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

You don't need to complete any actions for an inherited notification task if it's configured to automatically start after all predecessors are complete.

If an inherited notification task doesn't start automatically, you must manually start the task's notification schedule. Before starting the task, you can also edit its detail fields to match your project's requirements. For instance, you might want to customize the task's name or description, add additional recipients, or adjust the due date and notification schedule to suite your timeline.

For more information about notification tasks and the notification task workflow, refer to What Are Notification Tasks? and Management of Notification Tasks.

Procedure

1. In the project page's header, select **Tasks**.

   > ⓘ Note
   >
   > To start a task without editing it, select the task's **Start schedule** button in the **Tasks** table.

2. In the **Tasks** table, select a task's **More actions** icon (•••) and choose **Edit task**.

   The task opens with the **Task details** panel in edit mode.

3. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

> ⓘ Note
>
> If the template version of the task didn't specify notification recipients, you must choose at least one before you can start the task.
>
> Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.

4. In the task header, select **Start schedule** to start the task, or select **Close** to return to the project page without starting the task.

Task overview: Notification Tasks in Guided Sourcing Full Projects [page 227]

Related Information

Creating a Notification Task in a Guided Sourcing Full Project [page 228]
Cancelling a Notification Task's Schedule in a Guided Sourcing Full Project [page 231]

Cancelling a Notification Task's Schedule in a Guided Sourcing Full Project

Use this procedure to cancel a notification task's schedule to stop additional notifications.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.

Context

Since notification tasks are always optional, you can cancel them as needed. Cancelling a notification task's schedule prevents the task from sending any additional notifications.

If you cancel a notification task's schedule, you can resume the same schedule later, or create a new round and change the task's settings.

For more information about notification tasks and the notification task workflow, refer to What Are Notification Tasks? and Management of Notification Tasks.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the task's **Cancel schedule** button.

> ⓘ Note
>
> You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Next Steps

After you cancel the task's schedule, you can resume the cancelled round by selecting **Resume schedule** or create a new round by selecting the task's **More actions** icon (•••) and choosing **Create new round**.

Task overview: Notification Tasks in Guided Sourcing Full Projects [page 227]

Related Information

Creating a Notification Task in a Guided Sourcing Full Project [page 228]
Editing and Starting a Notification Task Inherited from a Template in a Guided Sourcing Full Project [page 230]

Completing Tasks in Guided Sourcing

The **Tasks** panel in a guided sourcing project shows the tasks for the project or event.

When you're assigned a task for a guided sourcing project or event, SAP Ariba:

- Adds the task to your **My Tasks** page.
- Adds the task to your calendar. The task status can indicate an action required by you.
- Sends you an email notification.
- If a task has a due date or end date specified, SAP Ariba also adds the task to your **To Do** portlet.

After you complete a task, it remains in your **To Do** portlet for 7 days by default. For information about this value, see Application.ACM.MinDaysCompletedTasksStayOnToDoPortlet.

Setting a To-Do Task to Started or Complete in a Guided Sourcing Full Project [page 233]

Approving or Rejecting an Approval Task in a Guided Sourcing Full Project [page 235]

Completing a Review Task in a Guided Sourcing Full Project [page 236]

Completing a Notification Task That Requires Manual Completion in a Guided Sourcing Full Project [page 238]

Parent topic: Tasks in Guided Sourcing Projects [page 182]

Related Information

Available Actions in the Tasks Table in Guided Sourcing Full Projects [page 184]
Creating a Task for an Entire Guided Sourcing Full Project [page 188]
Viewing the Details of a Task or Phase in a Guided Sourcing Full Project [page 190]
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Notification Tasks in Guided Sourcing Full Projects [page 227]

Setting a To-Do Task to Started or Complete in a Guided Sourcing Full Project

Use this procedure to set a to-do task to started or complete to record the progress of the associated action.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the task owner, the project owner, or have project owner capabilities for the project.
- To complete a to-do task that has an associated document, the document must be in a status other than **Not Created**, **Not Edited**, or **Not generated**.

Context

To-do tasks function as a way to track the progress of an action. The action a to-do task represents is often one that isn't completed inside the project itself.

If you're a to-do task's owner, you're also the user who completes the task's related action. Since setting a to-do task to started or complete doesn't trigger additional project activity, the primary purpose for these actions is to indicate the status of the task's related action. One exception is if the task is a predecessor for other tasks or phases in the project. In this case, setting the task to complete (or canceling it, if it's an optional task) allows you to begin working on the task's successor tasks or phases.

As the task owner, you can complete the following actions related to the task:

- Use the **Set to started** option to indicate that you've started work on the task's related activity.
- Use the **Set to complete** option to indicate that you've completed work on the task's related activity.
- Use the **Reset** option to return the task to the **Not Started** status.
- Use the **Cancel** option to indicate that the task doesn't require completion.
  This option is only available for optional tasks.

> ⓘ Note
>
> You can limit the items in the **Tasks** table to the ones you need to work on by selecting **Assigned to me**. This view shows tasks where you're any of the following:
>
> - The task owner
> - A reviewer
> - An approver
> - A recipient
>
> This filtered view also shows the parent phases of your assigned tasks.

For information about completing guided sourcing tasks from your **My Tasks** page, see Marking a To Do Task as Started or Completed.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the task's available action button.
   - To indicate that a to-do task is in progress, select **Set to started**.
   - To indicate that a task is complete, select **Set to complete**.

   > ⓘ Note
   >
   > You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Next Steps

After marking a to-do task complete, you can reset its status to **Not Started** by selecting the task's **Reset** button in the **Tasks** panel.

Task overview: Completing Tasks in Guided Sourcing [page 232]

Related Information

Approving or Rejecting an Approval Task in a Guided Sourcing Full Project [page 235]
Completing a Review Task in a Guided Sourcing Full Project [page 236]
Completing a Notification Task That Requires Manual Completion in a Guided Sourcing Full Project [page 238]
Searching, Completing Tasks, and Other Common User Actions

Approving or Rejecting an Approval Task in a Guided Sourcing Full Project

As an approver, you complete an approval task by approving or rejecting it using this procedure. If you reject an approval task, you can also provide comments or suggest document updates to the task owner.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be an active approver in the task's approval flow.

Context

In an approval task, users in the approval flow approve or reject the task's associated object. The associated object is typically a document or folder in a project, but it can also be a particular component of a sourcing event, such as event content, submitted team grades, or a proposed award scenario.

If you approve an approval task, the task either activates the next user in the approval flow or completes the task if you're the final approver. If you reject an approval task, the task stops the current approval flow, and the task owner must restart the approval flow by creating a new task round.

When you approve or reject an approval task, you can also submit optional comments or attachments. Any comments or attachments appear with your task completion entry in the task's **Comments and activity history** panel. Adding comments or attachments is most useful when rejecting an approval task, as it provides a way for you to suggest changes to the task owner.

> ⓘ Note
>
> You can limit the items in the **Tasks** table to the ones you need to work on by selecting **Assigned to me**. This view shows tasks where you're any of the following:
>
> - The task owner
> - A reviewer
> - An approver
> - A recipient

This filtered view also shows the parent phases of your assigned tasks.

For information about completing guided sourcing tasks from your **My Tasks** page, see Marking a To Do Task as Started or Completed.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, locate the approval task you want to approve or reject.

   > Note
   >
   > You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.
3. **Optional:** In the task's **Associated document** column, select the document's name to view or download the document.
4. Select the task's **Approve** or **Reject** button.
5. **Optional:** Edit the optional comment text and attach any documents as necessary.
6. Select the popup's **Approve** or **Reject** button.

Task overview: Completing Tasks in Guided Sourcing [page 232]

Related Information

Setting a To-Do Task to Started or Complete in a Guided Sourcing Full Project [page 233]
Completing a Review Task in a Guided Sourcing Full Project [page 236]
Completing a Notification Task That Requires Manual Completion in a Guided Sourcing Full Project [page 238]
Searching, Completing Tasks, and Other Common User Actions

Completing a Review Task in a Guided Sourcing Full Project

Use this procedure to complete a review task in a guided sourcing full project. As a reviewer, you either edit a review task's document directly or propose changes to the task owner.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

- You must be an active approver in the task's approval flow.

Context

In a review task, users in the approval flow review the task's associated object, which is typically a document or folder from a project. If the task is a **Review for team grading** task, the associated object is an event.

As a reviewer, you view a task's object, then add comments or propose changes for the doc owner. If the **Reviewer can edit** setting is enabled for a review task associated with a document or folder, you can replace the task's associated document, or documents in the associated folder.

When you complete a review task, you can include comments or attachments. Any comments or attachments appear with your task completion entry in the tasks' **Comments and activity history** panel. Adding comments or attachments is most useful for review tasks that don't allow you to directly edit the document, as it provides a way for you to suggest changes to the task owner.

> ⓘ Note
>
> You can limit the items in the **Tasks** table to the ones you need to work on by selecting **Assigned to me**. This view shows tasks where you're any of the following:
>
> - The task owner
> - A reviewer
> - An approver
> - A recipient
>
> This filtered view also shows the parent phases of your assigned tasks.

For information about completing guided sourcing tasks from your **My Tasks** page, see Marking a To Do Task as Started or Completed.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, locate the review task you need to complete.
3. In the task's **Associated documents** column, select the document's name to view or download the document.

   > ⓘ Note
   >
   > If the task owner enabled the task's **Reviewer can edit** setting, you can replace the associated document by selecting the task's name, then using the options available from the **Associated document** panels **Replace document** menu.
4. Select the task's **Complete review** button.
5. **Optional:** Edit the optional comment text and attach any documents as necessary.
6. Select the popup's **Complete review** button.

Task overview: Completing Tasks in Guided Sourcing [page 232]

Related Information

Setting a To-Do Task to Started or Complete in a Guided Sourcing Full Project [page 233]
Approving or Rejecting an Approval Task in a Guided Sourcing Full Project [page 235]
Completing a Notification Task That Requires Manual Completion in a Guided Sourcing Full Project [page 238]
Searching, Completing Tasks, and Other Common User Actions

Completing a Notification Task That Requires Manual Completion in a Guided Sourcing Full Project

If a notification task requires manual completion, you must set the task to complete in the project before the due date. Use this procedure to complete the notification task.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must meet one of the following requirements:
  - You're the task owner.
  - You're a task notification recipient.
  - You're the project owner.
  - You have project owner capabilities for the project.

Context

Notification tasks provide a way to send one-time or repeating email reminders to users to complete project-related actions that can't be easily managed with one of the other task types. The default configuration for a notification task allows the task to complete automatically after triggering its notification, but template, project, or task owners can also configure a notification task to require manual completion.

If you receive a notification from a notification task that requires manual completion, you must set the task to complete in the project before the due date. If the due date passes before you set the task to complete, the task starts sending overdue notifications.

A recurring notification task can also be configured to require manual completion. Since recurring notification tasks use a schedule to trigger notifications, it's possible for the date of a subsequent notification, or multiple subsequent notifications, to pass by the time you set the current round to complete. When this happens, you must set the current overdue notification round and each subsequent overdue notification round to complete for the task to correctly schedule the next notification.

ⓘ Note

You can limit the items in the **Tasks** table to the ones you need to work on by selecting **Assigned to me**. This view shows tasks where you're any of the following:

- The task owner
- A reviewer
- An approver
- A recipient

This filtered view also shows the parent phases of your assigned tasks.

For information about completing guided sourcing tasks from your **My Tasks** page, see Marking a To Do Task as Started or Completed.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the task's **Set to complete** button.

   ⓘ Note

   You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Results

If the task is a one-time notification, the task's status changes to **Complete**. If the task has a recurring notification schedule, the current round's status changes to **Complete** and the next round is automatically scheduled.

Task overview: Completing Tasks in Guided Sourcing [page 232]

Related Information

Setting a To-Do Task to Started or Complete in a Guided Sourcing Full Project [page 233]
Approving or Rejecting an Approval Task in a Guided Sourcing Full Project [page 235]
Completing a Review Task in a Guided Sourcing Full Project [page 236]
Searching, Completing Tasks, and Other Common User Actions

Phases in Guided Sourcing Full Projects

Use phases to organize tasks. Phases can be scheduled to automatically recur. You can also specify predecessor tasks or phases to define and enforce the order in which tasks must be completed.

Related Information

Tasks in Guided Sourcing Projects [page 182]

Creating a Phase in a Guided Sourcing Full Project

This procedure demonstrates how to use phases to arrange and organize your project's tasks. Add additional levels of organization to a phase by including subphases, or create a recurring phase to manage repeating project processes.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

It is not necessary to use phases in a project, but they are helpful in organizing tasks and activities. You can configure recurring phases, which are phases that are automatically re-created at regular intervals. Recurring phases are useful for tasks that re-occur at regular intervals, such as reviews that occur once every month.

Phases can either come from a template, or you can create them in a project.

By default, a phase automatically starts when one of its tasks is marked Started or Complete and automatically completes when all of its required tasks are complete. (These behaviors are controlled by the parameters `Application.ACM.PhaseAutoStart` and `Application.ACM.PhaseAutoComplete`, as described in Site Configuration Options for Phases.)

If a phase is automatically started by SAP Ariba when one of its tasks is started, it remains started even if tasks are reset to the Not Started state.

> **Restriction**
>
> It is not possible to add tasks to a recurring phase in guided sourcing.

You can also specify **predecessor tasks** or **predecessor phases** for a phase to enforce the order in which tasks and phases are completed. Before a phase to start, any required predecessor tasks must be completed and any optional predecessor tasks must be completed or canceled. In addition, all required tasks in any predecessor phase must be completed and all optional tasks in any predecessor phase must be completed or canceled.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** panel, complete one of the following actions:
   - Create a new phase by selecting **Create** > **Phase**.
   - Create a new subphase by selecting an existing phase's **More actions** icon (•••) and choosing **Create subphase**.
3. Enter a name for the phase.
4. **Optional:** Complete any additional fields as necessary.

   Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.
5. **Optional:** If you're creating a phase that repeats periodically during the project, configure the recurring phase settings:
   a. Set **Recurring phase** to **Yes**.
   b. Use the **Recurrence schedule** field's options to specify the day of the month when a new phase recurrence is generated and the number of months between each recurrence.

   For more information on recurring phases, refer to Recurring Phases.
6. **Optional:** Select predecessor tasks or phases in the **Predecessors** selector.
7. Select **Create**.

Related Information

Use of Phases to Organize Tasks

Editing Phase Details in a Guided Sourcing Full Project

Use this procedure to edit an existing phase's fields, which allows you to customize an inherited phase, add a planned phase start date, and manage manually created recurring phases.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

You can edit or complete the detail fields of phases created manually for the project and phases inherited from the project template. You might need to edit inherited phases if your company's templates include phases that you customize to reflect your use case.

> Note
>
> You can edit a phase's name directly in the **Tasks** table.
>
> To edit a field inline in the table, hover your cursor over the field's name and select the edit icon ( ).

You can also choose a **Planned start date** for an existing phase. This field isn't available on the phase creation page and only appears in the **Phase details** panel for existing phases.

In addition, if you manually added a phase to your project, you can convert it to a recurring phase by changing the **Recurring phase** setting. You can also convert a manually created recurring phase to a standard phase in the same way, as long as you haven't started the master recurring phase.

> Note
>
> You can't enable or disable phase recurrences on a phase inherited from the project template.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select a phase's **More actions** icon ( ) and choose **Edit phase**.

   The phase opens with the **Phase details** panel in edit mode.
3. Edit or complete any of the fields as necessary, then select **Save** to apply your changes.

Refer to Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects [page 665] for descriptions of task fields.

Starting a Recurring Phase in a Guided Sourcing Full Project

Use this procedure to start a recurring phase in a guided sourcing full project. Recurring phases help simplify repeating project processess. After you start a recurring phase, it automatically generates new phases based on its recurrence schedule.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

You use recurring phases for repeating processes. For example, if you have a monthly review that involves three tasks for each review, you can create a recurring phase that contains those tasks. SAP Ariba creates new instances of a recurring phase for you at regular intervals. SAP Ariba continues to create phases until you stop the recurrence or close the project, regardless of whether the previous phases are completed.

The phase that controls the creation of new phases is called the master recurrence. Each individual instance of the phase is called an occurrence.

You specify the interval between recurring phases in the master recurrence's **Recurring schedule** fields. These fields specify the day of the month each phase starts and the frequency of the phases, in months.

You must start the master recurrence to initiate the recurring phase sequence. When you start the recurrence, the master recurrence is hidden, and the first occurrence phase is created. Each occurrence contains instances of all the tasks the master recurrence contains.

Because the application copies all tasks for each occurrence of the phase from the master recurrence, SAP Ariba recommends that you publish all documents associated with the master recurrence before starting the recurrence so that they can be used in the phases.

> Note
>
> Do not specify recurring phases as predecessors.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, select the master recurring phase's **Start recurrence** button.

> ⓘ Note
>
> You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Results

After you start a recurring phase, the master phase is automatically hidden and the first occurrence of the phase is added to the **Tasks** table.

Related Information

Recurring Phases

Displaying or Hiding a Master Recurring Phase in a Guided Sourcing Full Project

Use this procedure to display or hide a master recurring phase in a guided sourcing full project. The **Tasks** table automatically hides a master recurring phase after you start it, but you can manually display thse phase if you need to view or edit it.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

By default, after the recurring phase begins, the occurrences display but the master recurrence is hidden. You can show the master recurrence to view and edit it, and hide it the rest of the time to keep the **Tasks** table uncluttered.

Procedure

1. In the project page's header, select **Tasks**.
2. In the **Tasks** table, locate a phase that is an instance of the master recurring phase you want to display or hide, then complete one of the following actions:
   - Display the master recurring phase by selecting the phase's **More actions** icon (•••) and choose **Show recurrence**.
   - Hide the master recurring phase by selecting the phase's **More actions** icon (•••) and choose **Hide recurrence**.

Stopping or Restarting a Recurring Phase in a Guided Sourcing Full Project

Use this procedure to stop or resume the creation of recurring phase instances as needed.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Procedure

1. In the project page's header, select **Tasks**.
2. Show the master recurrence for the phase you'd like to change by completing the following actions:
   a. In the **Tasks** table, locate an instance of the recurring phase.
   b. Select the phase's **More actions** icon (•••) and choose **Show recurrence**.
3. Select the master recurring phase's available button to complete one of the following actions:
   - Select **Stop recurrence** to suspend the creation of additional instances of the phase.
   - Select **Restart recurrence** to resume the creation of additional instances of the phase.

> ⓘ Note
>
> You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Changing the Time Interval for a Recurring Phase in a Guided Sourcing Full Project

If the timeframe for a repeating process changes, use this procedure to modify the recurring phase's interval to match your new schedule.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

The occurrences of a recurring phase inherit all of the details of the master recurrence, such as the **Name** and **Description** values. If you modify a phase's master recurrence, changes only affect future occurrences. Any existing occurrences maintain the original details.

If you modify the time interval of a master recurrence, instances that you create after the schedule change will follow the new schedule, but instances that were created but not started before the schedule change will follow the previous schedule.

Procedure

1. In the project page's header, select **Tasks**.
2. Show the master recurrence for the phase you'd like to change by completing the following actions:
   a. In the **Tasks** table, locate an instance of the recurring phase.
   b. Select the phase's **More actions** icon (•••) and choose **Show recurrence**.
3. Select the master recurring phase's **More actions** icon (•••) and choose **Edit phase**.
4. Edit the **Recurrence schedule** field's options as necessary.

   > Note
   >
   > After you start a recurring phase, you can't convert it into a regular phase.

5. In the upper-right corner of the **Phase details** panel, select **Save**.

Creating a New Occurrence of a Recurring Phase in a Guided Sourcing Full Project

Use this procedure to create a new occurrence of a recurring phase in a guided sourcing full project. A recurring phase automatically creates new phase occurrences based on its **Recurrence pattern**, but you can also manually create new occurrences as necessary.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

You can only create a new occurrence (instance of a phase) in a recurring phase that has been started.

Procedure

1. In the project page's header, select **Tasks**.
2. Show the master recurrence for the phase you'd like to change by completing the following actions:
    a. In the **Tasks** table, locate an instance of the recurring phase.
    b. Select the phase's **More actions** icon (•••) and choose **Show recurrence**.
3. Select the master recurring phase's **More actions** icon (•••) and choose **Create new occurrence**.

> Note
>
> You can also complete task- and phase-related actions by selecting the name of a task or phase in the **Tasks** table and then using the buttons in the upper-right corner of the details page.

Related Information

Starting a Recurring Phase in a Guided Sourcing Full Project [page 243]

Users and Team Groups in Guided Sourcing Full Projects

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

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

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

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

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

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

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

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

Changing the Owner of a Guided Sourcing Full Project [page 249]

Adding a New Group to the Project Team in a Guided Sourcing Full Project [page 250]

Changing the Owner of a Guided Sourcing Full Project

This procedure demonstrates how to change a project's owner as necessary, but you can also give other users project owner capabilities by adding them to certain team groups.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

The user who initially displays as the project owner in the **Project summary** panel is also the user who created the project. This user is also automatically a member of the **Project Owner** team group.

A user doesn't need to display in the **Project summary** panel to have project owner capabilities for a project. You can give another user the same capabilities by adding them to a team group assigned the **Project Owner** role. The simplest method for this is by using the automatically generated **Project Owner** team group, but you can also add the **Project Owner** role to your own custom team groups. Refer to Adding a New Group to the Project Team in a Guided Sourcing Full Project [page 250] for more on creating and editing team groups in guided sourcing full projects.

If a user is a member of certain global groups, such as **Customer Administrator** or **Sourcing Project Administrator**, the user doesn't need to be assigned project owner capabilities explicitly. Instead, the user gains these capabilities if they appear in the project team in any capacity, even in a group with no additional roles assigned. Refer to Additional Users with Project Owner Capabilities for a list of the global groups that provide these capabilities.

For more details on the **Project Owner** group and licensing factors to consider when adding users to this team group, refer to Unique Characteristics of the Project Owner Group.

Procedure

1. Open a guided sourcing full project.
2. Show the full **Project summary** panel by selecting the panel's **Expand** icon ( ).
3. In the **General information** section, select **Edit**.
4. Select the **Owner** field's value help icon ( ).
5. In the user selection popup, locate the correct user by searching or scrolling, then choose the radio button next to that user and select **Save**.

6. In the the **General information** section, select **Save** to apply the changes or **Cancel** to discard them.

Results

The chosen user becomes the project's owner.

> ⓘ Note
>
> Changing the user shown in the **Project summary** panel removes you as the direct project owner, but you remain a member of the **Project Owner** team group.

Task overview: Users and Team Groups in Guided Sourcing Full Projects [page 248]

Related Information

Adding a New Group to the Project Team in a Guided Sourcing Full Project [page 250]

Adding a New Group to the Project Team in a Guided Sourcing Full Project

Use this procedure to add users to project team groups to allow them to complete specific actions in projects or view certain access-controlled projects.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the project owner or have project owner capabilities for the project.

Context

It may be beneficial or necessary to add a user to a project's team, even if the user doesn't complete any actions in the project. For instance, if you use the **Private to Team Members** access control on your project, a user must be a member of the project team to access the project. A user is still a member of the project team if the group they belong to isn't assigned any roles.

If your workflow consistently requires project access for users other than the ones directly involved in completing the project, the best option is to configure project team structure on the project template. Using this strategy helps reduce the need to manually edit a project's team. For information on configuring project teams in templates, refer to Project Groups and Team Members for Project Templates.

You can assign a number of roles to project team groups, but the following are the most common nonowner roles:

- Active Team Member
- Team Member with Limited Access
- Observer Team Member

For the full capabilities provided by each role, refer to Project Group Roles.

Procedure

1. Open a guided sourcing full project.
2. In the project's header, select the **Team** icon ( ) next to the project's name.
3. In the **Team** popup, select **Create group**.

   You can edit an existing project group instead by selecting the group's edit icon ( ).

   To remove a project group, select the group's delete icon ( ).
4. In the **Create group** popup, enter a name for the group, assign group roles, and choose one or more group members.
5. Select **Create**.

Task overview: Users and Team Groups in Guided Sourcing Full Projects [page 248]

Related Information

Changing the Owner of a Guided Sourcing Full Project [page 249]

Global Settings for Guided Sourcing Events

Guided sourcing events have global settings that dictate how the event runs and general information about the event.

In addition to items that need quotes, questions and requirements, guided sourcing events have global settings. Global settings for events include:

- Event rules, which govern how your event runs, including rules that determine what suppliers (participants) can do and view.
- Event start and end times.
- General information about the event (sometimes referred to as "header fields"), such as the geographic regions for the event and the estimated total spend for the event.

About the Editing Page for Guided Sourcing Events [page 253]

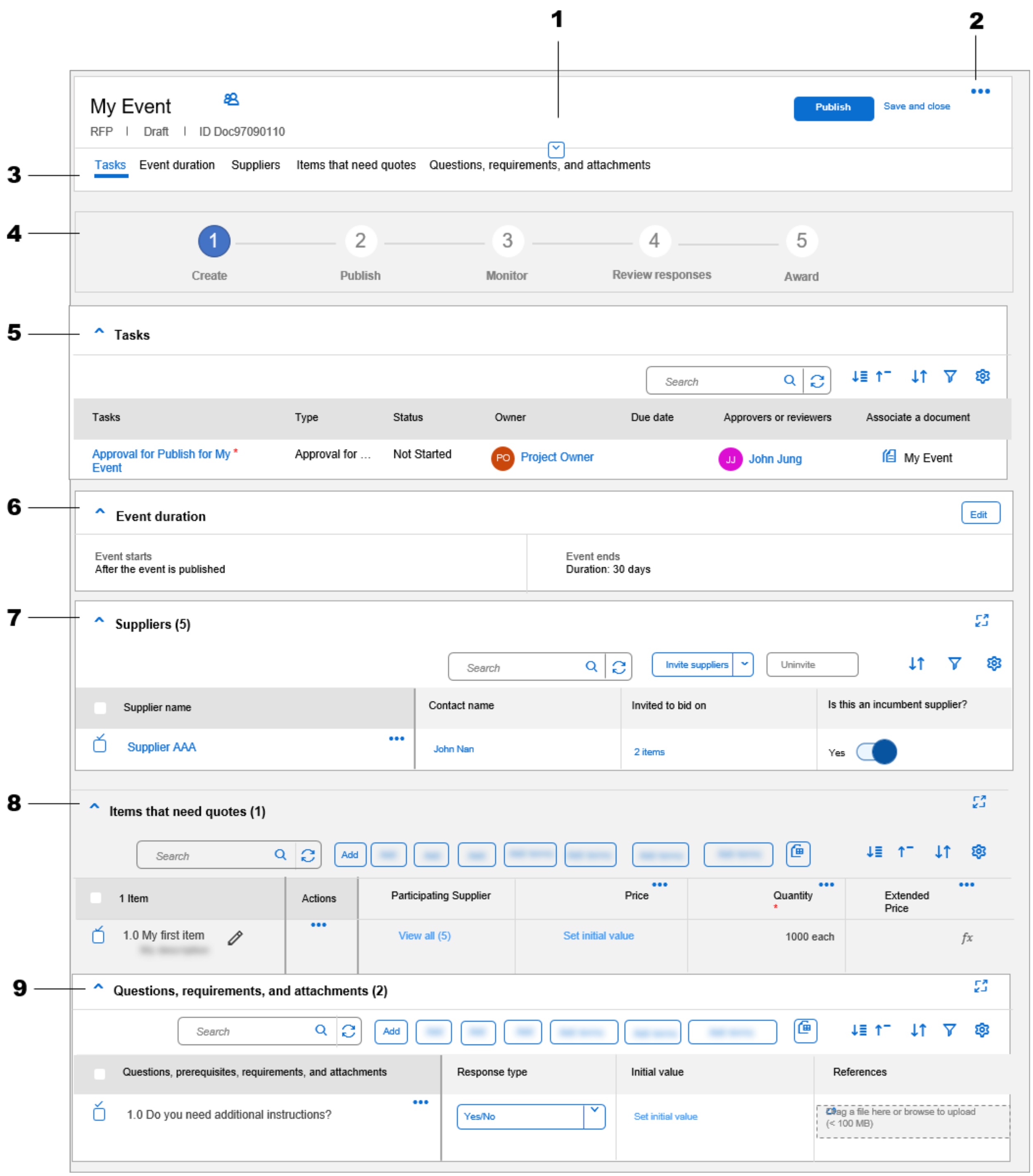
Editing Event Rules in Guided Sourcing Events [page 255]

Editing Timing Options and Event Start and End Times in Guided Sourcing Events [page 257]

Editing General Event Information in Guided Sourcing Events [page 258]

About the Editing Page for Guided Sourcing Events

Before publishing a guided sourcing event, you can use the event editing page to edit information about the event, including event rules. You also use this page to invite suppliers (participants) and add items that need quotes or other content.



ⓘ Note

You may see the panels in a different order than what's shown. The order in which the event panels appear to project owners and suppliers is controlled by the **Choose the order of event content for project owners to edit** rule in the event template.

The editing page for guided sourcing events includes the following key components:

1. Header area with general information about the event. Click the expand icon ( ) to show the event **Currency**, **Commodity**, **Regions**, **Department**, and other fields.
2. More icon ( ) for the event. Click to open a menu with options to copy the event, delete the event, download an event summary, view the event audit log, or edit event rules.
3. Links to panels on the page.
4. Process flow graph [page 254] that shows your progress in the workflow for this event.
5. Tasks panel. Open tasks, view approval flows and make limited changes. This panel is present only if the event has an associated task, such as an **Approval for publish** task.
6. Event duration panel. Edit the event start or end [page 257] time.
7. **Suppliers** [page 253] panel. Show or edit the suppliers (participants) you've added to the event. They'll receive invitations to the event when you publish the event..
8. **Items that need quotes** [page 328] panel. Show or edit items that you're soliciting pricing information for, such as lots or line items.
9. **Questions, requirements, and attachments** [page 388] panel. Show or edit questions, prerequisites, requirements, or attachments for the event.

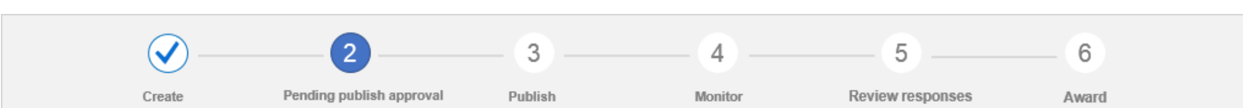
Parent topic: Global Settings for Guided Sourcing Events [page 252]

Related Information

Editing Event Rules in Guided Sourcing Events [page 255]
Editing Timing Options and Event Start and End Times in Guided Sourcing Events [page 257]
Editing General Event Information in Guided Sourcing Events [page 258]

Guided Sourcing Event Process Flow Graph

Each guided sourcing event shows a process flow graph that records your progress through the workflow for the event:



The workflow for an event contains the following steps:

1. **Create**: Create the event and build it by adding the following information:
    - Suppliers (participants) who will bid on or respond to items in your event

- Items that need quotes (items that you want price quotes for)
- Questions, prerequisites, requirements, and attachments

2. **Pending publish approval**: This step only appears if your event has an **Approval For Publish** task. In this case, you submit the event for publishing and the event is in the pending publish approval state (waiting for approval to be published).
3. **Published**: The event is published, but the bidding (response) time hasn't started. Invitations are sent to suppliers when the event is published.
4. **Monitor**: Suppliers can bid or submit responses and you can monitor the responses.
5. **Review responses**: Bidding closes. You review supplier responses and create scenarios for awards by choosing suppliers and items to award; guided sourcing shows you information such as the total spend for each scenario.
6. **Pending award approval**: This step only shows if your event has an **Approval For Award** task. In this case, you submit a scenario for publishing and the event is in the pending award approval state (waiting for award to be published).
7. **Award**: An award has been created for the event.

Completed steps have a checkmark, and the current step is highlighted in blue. In this example, the current step is **Pending publish approval**.

Editing Event Rules in Guided Sourcing Events

Use this procedure to edit event rules in guided sourcing events. Event rules govern how your event runs, including rules that determine what suppliers (participants) can do and view.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

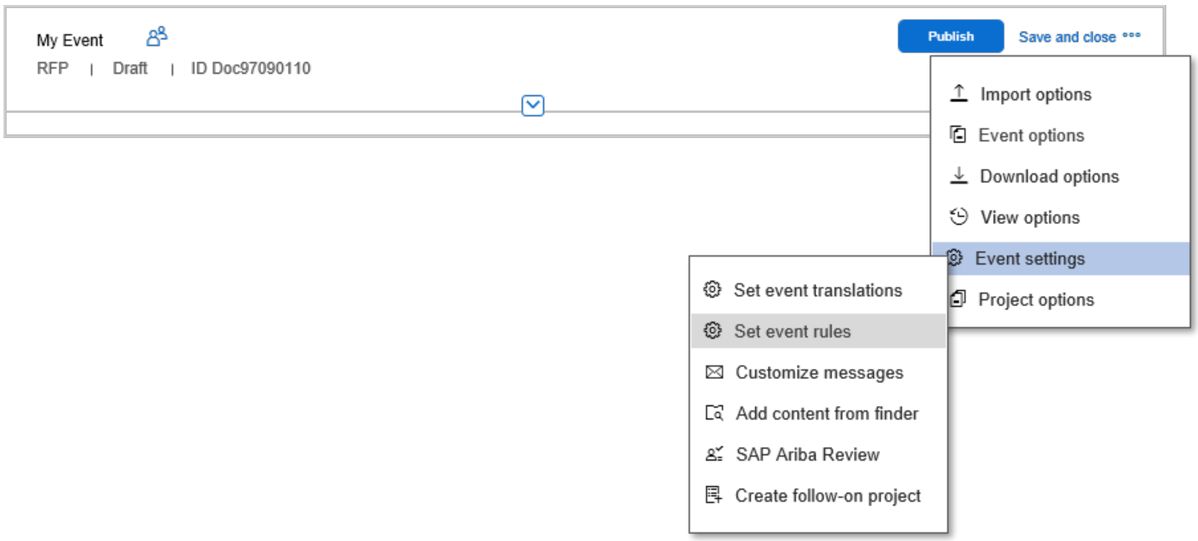
To simplify configuration, you can modify only a subset of event rules in guided sourcing events. In addition, the event rules you can view and modify are determined by rule settings in the template used to create your event.

> ⓘ Note
>
> For convenience, you set values for the **Event start date** and **Event end date** and other timing rules in the Event duration panel [page 257] on the main page for an event.

For information about specific rules, see the Event rules reference guide.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Navigate to the upper-right corner of the event editing page and click the more icon (•••) and select **Event settings** > **Set event rules**.



3. The **Set event rules** popup lists the event rules you can modify. Set or clear the selection boxes to enable or disable rules.

   For descriptions of event rules, see the Event Rules Reference Guide.

   For more information on guided sourcing RFI and RFP event rules, see Guided Sourcing RFI and RFP Event Rules.

Task overview: Global Settings for Guided Sourcing Events [page 252]

Related Information

About the Editing Page for Guided Sourcing Events [page 253]
Editing Timing Options and Event Start and End Times in Guided Sourcing Events [page 257]
Editing General Event Information in Guided Sourcing Events [page 258]

Editing Timing Options and Event Start and End Times in Guided Sourcing Events

Use this procedure to edit timing options, including the event start and end times in guided sourcing events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

Use event timing options to set start and end times for the preview period, bidding (response) period, and review period. You can also set options for sending reminders to participants and team members for the time periods.

The **event start time** specifies when suppliers (participants) can begin submitting responses (bids) for an event. The **event end time** specifies when an event closes and suppliers can no longer submit responses.

Note that in the classic sourcing user interface and in templates, users set event timing options using event rules. As with other event rules, the event timing options you can view and modify are determined by rule settings in the template used to create your event.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the event duration panel and click **Edit**.
3. Select a specific date and time for the event start time. Alternatively, you can select **Start event after Publish is selected** to start the event after it is published.
4. Choose one of the following to configure the event end time:
    - **Time**. Choose a date and time when the event ends.
    - **Duration**. Enter a value in, minutes, hours, or days to specify the length of the event.
5. To configure reminders for time periods, select **Send reminders**. The options for sending reminders that you can set are shown.
    - **First reminder before the end time**: Specify the number of days, hours, or minutes before the event end time at which you want to receive the first reminder.
    - **Time between recurring reminders**: Specify a schedule (in days, hours, or minutes) for the recurring reminders.

- **Last reminder before the end time**: Specify the number of days, hours, or minutes before the event end time at which you want to receive the last reminder.

> ⓘ Note
>
> - These fields do not accept decimal values.
> - If **Enable preview period** is selected as `Yes` and the **Start and end time for preview period** is set to `Start after publish and end when event begins`, with **Can participants place bids during preview period?** set to `Do not allow prebids` or `Allow prebids` or **Require prebids**, the additional reminder fields are displayed after adding the **Event bidding starts** time. These fields include **First reminder before the start time**, **Time between recurring reminders**, and **Last reminder before the start time**.
> - If **Enable preview period** is selected as `Yes` and the **Start and end time for preview period** is set to `Custom`, with **Can participants place bids during preview period?** set to `Allow prebids`, the additional reminder fields are displayed after **Prebid end time**. These fields include **First reminder before the prebid end time**, **Time between recurring reminders**, and **Last reminder before the prebid end time**.

Task overview: Global Settings for Guided Sourcing Events [page 252]

Related Information

About the Editing Page for Guided Sourcing Events [page 253]
Editing Event Rules in Guided Sourcing Events [page 255]
Editing General Event Information in Guided Sourcing Events [page 258]
About Event Timing Rules
Event Reminder Messages

Editing General Event Information in Guided Sourcing Events

Use this procedure to edit general event information in guided sourcing events. General event information (also referred to as header information) applies to all items in an event, such as the geographic regions for the event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

Event information (also referred to as header information) applies to all items in an event.

Your organization may use **Commodity**, **Regions**, or **Departments** values to determine what templates are available to create your event and to determine team members, rules, initial content, and approvals needed to publish or award an event.

If your site uses SAP Ariba Supplier Lifecycle and Performance, suppliers may be designated with a qualification status and preference level for a commodity and region combination. Specifying commodities and regions for events can be used to filter or restrict suppliers based on their qualification status for the commodity and region.

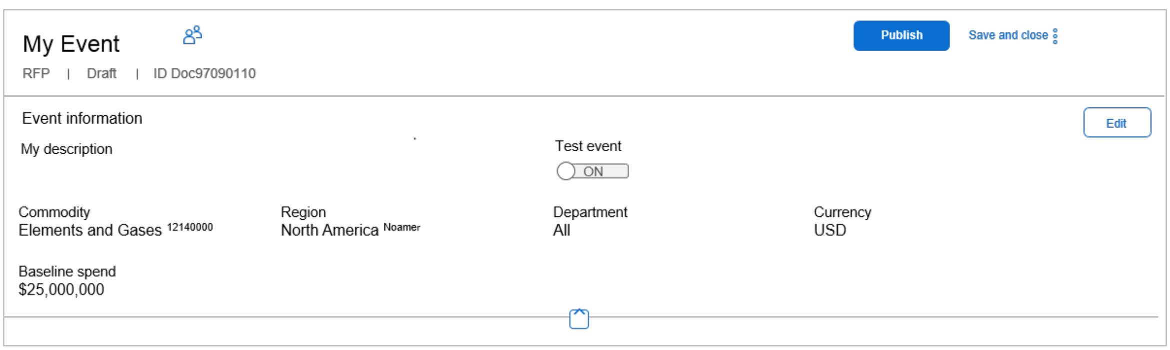
Your organization may also use the **Commodities**, **Regions**, or **Departments** values when creating and analyzing reports about events.

The **Event information** may also include custom fields used by your organization.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. To edit header field values:
   a. Click the expand icon (⌄) in the center of the horizontal divider below the event name.

      The **Event information** area opens to show the event **Currency**, **Commodity**, **Regions**, **Department**, and other fields:

   b. Click the **Edit** button in the upper-right corner of the **Event information** area.

      Use the choosers to search for and select new values for the header fields.
   c. Click **Save**.
3. To edit the event name, click the event name in the upper-left corner.

   The event name field expands. Enter your changes directly in the event name field.

Task overview: Global Settings for Guided Sourcing Events [page 252]

Related Information

About the Editing Page for Guided Sourcing Events [page 253]
Editing Event Rules in Guided Sourcing Events [page 255]
Editing Timing Options and Event Start and End Times in Guided Sourcing Events [page 257]

Adding Team Members to Guided Sourcing Events

Use this procedure to add team members to guided sourcing events. Team members are users who can view and interact with the event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

Team members (also called project team members) are users who can view and interact with the event.

Your site can also have system or global groups (configured by an administrator) that have access rights and privileges for all events.

Team members for guided sourcing events do not have to be members of the global **Category Buyer** group. However, when team members who aren't members of the **Category Buyer** group view or edit a guided sourcing event, they use the classic SAP Ariba Sourcing user interface.

> ⓘ Note
>
> SAP Ariba recommends that you add only users who are members of the **Category Buyer** group to guided sourcing event teams and only allow users who are members of the **Category Buyer** group to access guided sourcing events.

Every event has a **Project Owner** group, and members of this group are also referred to as **event owners**. The **Project Owner** group has numerous capabilities; members can view and edit all content in an event, change the event duration, and create awards. When you create an event, SAP Ariba adds you to the **Project Owner** group for that event.

If you add a user to any project group and that user is also a member of a global group which has **Manage Project** permissions (such as the **Commodity Manager** or **Project Administrator** group), that user gains **Project Owner** capabilities for the event.

In most cases, you will just add users to an existing project group. If you create a new group, you must also select **roles** for the group, which determine the capabilities for the members of the group. Some of the roles typically used in project groups for sourcing events are:

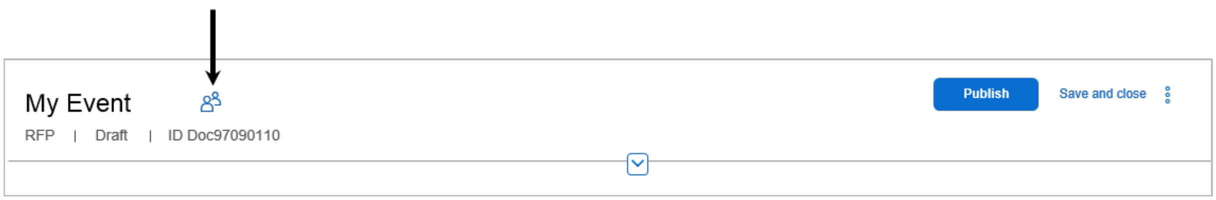
- **Active Team Member**: A member of a project group with only this role can view event contents but cannot edit event contents or event attributes.

- **Surrogate Bidder**: A member of a project group with this role can submit surrogate bids (bids on behalf of participants) for this event.
  Members of a project group with the **Surrogate Bidder** role can only submit surrogate bids for the specific event. By comparison, members of the global **Surrogate Bidders** group can submit surrogate bids for all events.

For more information about groups and team members, see the *Managing projects, teams, documents, and tasks* guide.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon) in the upper-right corner of the event page and select **Event options** **Edit event**.
2. Go to the upper-left corner of the event page and click the team icon ( ) next to the event name.



3. The **Team** popup shows the existing project groups for the event. To add members to an existing project group, click the edit icon ( ) next to the group name.
4. To add a new project group, click **Create group** in the **Team** popup.
   The **Create group** popup opens.
5. Enter a name for the group.
6. Select roles for the group.
7. Select users for the group.

Related Information

Management of Project Teams
Project Owner Group and Capabilities
Project Group Roles

Suppliers (Participants) in Guided Sourcing Events

You invite suppliers or participants to events so they can respond to questions, or submit pricing information or bids for items in the event.

In most sourcing events, you invite participants who are suppliers to respond to RFIs, RFPs, or to bid in reverse auctions. SAP Ariba also supports forward auctions, in which you are selling items and the participants you invite are buyers. Because most events are RFIs, RFPs, or reverse auctions, the term supplier is often used to refer to both types of participants (supplier participants and buyer participants).

Adding Suppliers (Participants) to Guided Sourcing Events

Use the **Suppliers** panel to add and manage suppliers (participants) in guided sourcing events.

When you add a supplier to an event, you also specify an individual or **contact** in the supplier company or organization to participate in your event. You can invite contacts that already exist in the system or create new contacts to invite. To create a new contact, you must add them to an existing supplier or create a new supplier.

SAP Ariba doesn't send email invitations to the suppliers in your event until you publish the event. This enables you to edit the list of invited suppliers as you create your event and ensures that invitations are sent to all invited suppliers at the same time.

When you invite suppliers to an event from the **Suppliers** panel, they are invited to the entire event and can bid on (submit responses for) all items in the event.

If you don't want a supplier to bid on a specific item, you can remove (uninvite or not allow the supplier to bid on that item) from the edit popup for the item.

You can manually invite suppliers to an event [page 266], or you can use intelligent supplier recommendations [page 263] to get SAP Ariba to recommend suppliers based on their participation in similar past events.

The **Suppliers** panel shows suppliers in a table format:

The **Suppliers** panel includes the following elements:

1. Search box. Searches all entries in the table with a simple, exact-match search that ignores case.
2. Button to add (invite) suppliers [page 266] to the event.

   > ⓘ Note
   >
   > The **Invite suppliers** button is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

3. Button to remove (uninvite) suppliers from the event. This button is available only if you have selected suppliers in the table.

   > ⓘ Note
   >
   > The **Uninvite** button is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

4. Expands the table to the full page.
5. Icons to sort (↓↑), filter ( ), and show or hide columns ( ).
6. Checkbox to select a supplier.
7. Organization name. Click to open the supplier card for this entry, with the Organization name, address, a summary of recent supplier sourcing activities, awarded contracts, and other information about the supplier.
   If your site uses SAP Ariba Supplier Lifecycle and Performance, the information includes the vendor ID, commodities, and regions the supplier is qualified for.
   If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, the information includes the **Risk level** field. Click the hyperlink in the **Risk level** field to open the supplier risk card with the supplier name, score, and risk level for the supplier.
   If your site integrated with SAP Ariba Supplier Management Solutions, you can navigate to the supplier 360° profile in the SAP Ariba Supplier Management Solutions for a supplier from the supplier card in guided sourcing events. The supplier 360° profile in SAP Ariba Supplier Management Solutions shows all of the information your organization has collected about a supplier. You can navigate to the supplier 360° profile from

the list of suppliers or supplier search results in a guided sourcing event that you create or edit in the guided sourcing user interface.
If your site integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Management Solutions, you can link existing supplier risk engagement projects to a guided sourcing event and seamlessly navigate between the supplier risk engagement projects and the supplier card in the guided sourcing.
If your site has SAP Ariba Contract Management integrated with SAP Ariba Sourcing, the contract information includes the contract status, owner, contract name, amount, contract type, effective date, and expiration date.
8. More icon for an item. Opens a menu with options to remove supplier from the event or preview the event as the supplier (view the event contents as the supplier will see the contents).

> ⓘ Note
>
> The **Remove supplier** option appears in the menu only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

9. Contact name. Click to view details about the contact. You can also send email to the contact. If there are other contacts for this supplier, you can change the contact for the event.
10. Number of items that the supplier is invited to bid on (respond to). Click to view a list of the items; you can also uninvite the supplier for items.
11. Incumbency status of the supplier. Turn on the toggle for the supplier that you want to mark as an incumbent.

The **Risk level** column appears if your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions. Click to open the supplier risk card with the name, score, and risk level for the supplier.

> ⓘ Note
>
> Although not recommended, you can also publish an event without inviting participants by enabling the parameter `Application.AQS.AllowPublishRFxWithoutSupplier`. Contact your Designated Support Contact (DSC) to enable the parameter.

Parent topic: Suppliers (Participants) in Guided Sourcing Events [page 263]

Related Information

Designating Suppliers as Incumbents in Guided Sourcing Events [page 291]
Designating Suppliers as Excluded in Draft Events [page 292]
Designating Suppliers as Excluded in Published Events [page 293]
Creating Supplier Organizations in Guided Sourcing Events [page 294]
Creating a Supplier Request in Guided Sourcing Events [page 296]
Creating New Supplier Contacts in Guided Sourcing Events [page 299]
Editing Supplier Contact Information in Guided Sourcing Events [page 301]
Automatic Addition of Preferred Suppliers in Guided Sourcing [page 303]

Manually Inviting Suppliers (Participants) to Guided Sourcing Events

Use this procedure to manually invite suppliers to guided sourcing events. A supplier (participant) must be invited to an event to place bids on or send responses for items in your event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be created from a template with the **Disable supplier invitation** rule set to **No**. For more information, refer to Disable supplier invitation.

Context

When you invite suppliers to an event from the **Suppliers** panel, they are invited to the entire event and can bid on (submit responses for) all items in the event.

If you don't want a supplier to bid on a specific item, you can remove (uninvite or not allow the supplier to bid on that item) from the edit popup for the item.

SAP Ariba doesn't send email notifications to your invited suppliers until you publish the event. This enables you to edit the list of invited suppliers as you create your event and ensures that invitations are sent to all invited suppliers at the same time.

These steps tell you how to manually invite a supplier to an event. You can also use intelligent supplier recommendations [page 263] to get SAP Ariba to recommend suppliers based on their participation in similar past events.

Procedure

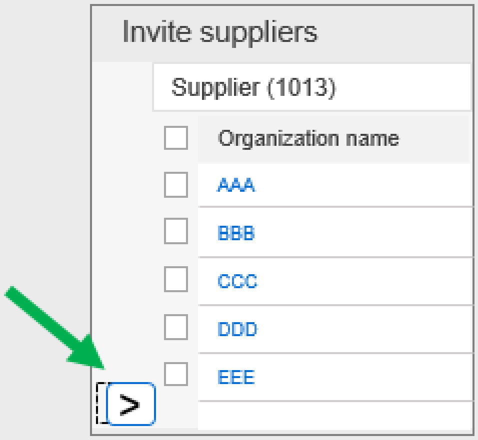
1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Suppliers** panel and click **Invite suppliers**.

   > ⓘ Note
   >
   > The **Invite suppliers** button is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

   A page opens that lets you search for suppliers with a search panel on the left side of the page.

ⓘ Note

The search panel may be collapsed based on your screen resolution and browser zoom values. If this occurs, click the expand icon (>) on the left edge of the of the **Supplier** table to expand the search panel:



You can use either the keyword search box or custom search filters in the search panel, or use both to refine search results.

If your event includes **Commodity**, **Region**, and **Department** attribute values, then you can use **Get values from the event**, when adding suppliers to a guided sourcing event, to set default **Commodity**, **Region**, and **Department** supplier search filters based on the event's attribute values.

You can also select the **Guided sourcing user preferences** option in the user preferences dropdown menu. From the **Guided sourcing user preferences** page, you can select the checkbox under **Edit default preferences** to use an event's **Commodity**, **Region**, and **Department** attribute data as default supplier search filters. You can turn off the default filters while working in an event with the **Get values from the event**. A search page opens that lets you search for suppliers. You can use either the keyword search box in the upper left checkbox, or you can manually remove filters.

3. For a keyword search, enter search terms in the search bar at the top of the search panel and click the search icon (🔍).
4. For a custom search, perform the following actions:
    a. Click the gear icon (⚙) in the search panel.

       A multiselect dropdown list **Search criteria setting** appears, consisting of several standard search filters.

       - If you view supplier information from the dashboard search function, your site uses supplier organizations. In this case, standard filters include:
           - **Organization Name**
           - **Commodities Supplied**
           - **Approved Commodities**
           - **Main Phone**
           - **Main Email Address**
           - **City**
           - **State/Province/Region**
           - **Postal Code**
           - **Country/Region**

    - **Type of Organization**
    - **Contact Name**
    - **User Unique Name**
    - **Business Email Address**

    If a question in the supplier profile questionnaire has been designated as a search filter, it also appears in this list as a custom filter. For more information, refer to Designating a Question as a Search Filter.

    > ⓘ Note
    >
    > If you set default filters from the **Guided sourcing user preferences** page or with the **Get values from the event** checkbox, then the **Commodities Supplied** filter is automatically populated. A custom filter created persists in this list until you change it in either the guided sourcing or classic user interface.

- If you view supplier information on the **Supplier Management** tab, your site uses SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture). In this case, there are the following standard filters:
    - **Regions**
    - **Commodity Categories**
    - **Qualification Status**
    - **Contact Name**
    - **Departments**
    - **Organization Name**
    - **Business Email Address**
    - **Vendor ID**
    - **ERP ID**

    When your site is integrated with SAP Ariba Supplier Lifecycle and Performance, you see the following additional filtering options, too:

    > ⓘ Note
    >
    > The following filters and **Qualification Status** are dynamic filters and appear for selection in the **Search criteria setting** listing only if there are matching entries in SAP Ariba Supplier Lifecycle and Performance.
    >
    > Guided sourcing displays only the active suppliers in search results even when the searches are based on the filters integrated from SAP Ariba Supplier Lifecycle and Performance.

    - **Process Status**
    - **Certificate Type**

        > ⓘ Note
        >
        > - Users can select only a maximum of 20 certificate types for the **Certificate Type** filter.
        > - Guided sourcing does not support the certificate expiry date filter.

    - **Certificate Status**
    - **Integrated with ERP**
    - **Category Status**

- **Registration Status**
- **Registration Update Status**

> ⓘ Note
>
> If you set default filters from the **Guided sourcing user preferences** page or with the **Get values from the event** checkbox, then the **Commodity Categories**, **Regions**, and **Departments** filters are automatically populated.

When your site is integrated with SAP Ariba Supplier Lifecycle and Performance, the following types of custom filters from SAP Ariba Supplier Lifecycle and Performance are also available:

- *Text*
- *Short text*
- *Multiline free text*
- *Yes/No (Boolean)*
- *Whole number and percentage*

Text, *Short text*, and *Multiline free text* filters can support free text entries or choices and allow single or multiple choices. *Whole number and percentage* type filters can support ranges and choices. Filters with up to five choices display the options as checkboxes. When there are more than five choices, they are displayed as multiselect dropdowns.

> ⓘ Note
>
> The custom filters are available only for searching and the corresponding values cannot be added to the search results view.

> ⚠ Restriction
>
> 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). On sites with either of these, when you search for suppliers, you'll 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'll see 50 search results, not just one.
>
> On sites without SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), when you search for suppliers, you'll see a maximum of 2000 search results. On sites with SAP Ariba Supplier Information and Performance Management (classic architecture), when you search for suppliers, you'll see a maximum of 2000 search results.
>
> The filters you select from the *Search criteria* setting dropdown are session-specific and are cleared when you leave the session. You need to select the filters again the next time you want to access the filters

- If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, the following standard filters are available:
  - **Regions**
  - **Commodity Categories**
  - **Organization Name**

- **Contact First Name**
- **Contact Last Name**
- **Risk Level**
  The **Risk Level** standard filter enables you to search for suppliers based on their risk levels. For more information, refer to Searching for Suppliers for Guided Sourcing Events Based on Risk Levels [page 271].
- **Process Status**
- **Certificate Type**
- **Certificate Status**
- **Integrated with ERP**
- **Category Status**
- **Registration Status**
- **Registration Update Status**

> ⓘ Note
>
> The filters such as **Risk Level** and the ones listed after **Risk Level** in the preceding list are dynamic filters and appear for selection in the **Search criteria setting** listing only if there are matching entries in SAP Ariba Supplier Lifecycle and Performance.

b. Select search filters and click **Save** or **Apply** to enable the filters.

Any search filter you enabled appears in the left panel, and persists in this panel until you change it in either the guided sourcing or classic user interface.

c. Set one or multiple search filters you enabled and click **Search**.

5. Select the suppliers whom you want to invite.

The total number of suppliers selected is displayed on the top-right of the **Invite suppliers** page.

6. Click **Invite**.

Results

The suppliers for the event are displayed in the **Suppliers** panel.

- Click the organization name to open a supplier card with information about the supplier.
- Click a name in the **Contact name** column to view details about the contact. You can also send email to the contact. If there are other contacts for this supplier, you can change the contact for the event.
- Click an entry in the **Invited to bid on** column to see a list of the items the supplier is invited to bid on. You can also uninvite the supplier from bidding on items.
- > ⓘ Note
  >
  > The **Uninvite** button is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

  If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, click a hyperlink in the **Risk level** column to open a supplier risk card with supplier risk information.

When you publish your event, invited supplier contacts receive email invitations for the event.

> ⓘ Note
>
> If you reopen the **Invite suppliers** page by clicking the **Invite suppliers** button, and deselect the invited suppliers, then the total number of suppliers selected is updated on the top-right of the **Invite suppliers** page. However, the invited suppliers stay invited to the event until you select the suppliers in the **Suppliers** panel and click the **Uninvite** button.

Searching for Suppliers for Guided Sourcing Events Based on Risk Levels

Use this procedure to search for suppliers for guided sourcing events based on risk levels.

Prerequisites

- This feature is supported only in the guided sourcing user interface. This feature adds support in guided sourcing for viewing supplier risk information.
  Your site must be set up for guided sourcing.
- You must be a member of the **Category Buyer** group to create and run guided sourcing events. For more information, see Managing events with guided sourcing.
- Your site must be integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions.
- You must enable the self-service configuration parameter **Application.SM.RiskLevelSearchFilter** in **SM Administration** > **Configuration Parameters** to use the risk filter in the search page. You must be a member of **SM Ops Administrator** group to enable or disable the configuration parameter. For more information, see Reference of Configuration Parameters in SM Administration.

Context

In the guided sourcing user interface, you can search for suppliers based on risk levels, such as high, medium, low, and unknown. Buyers can decide which suppliers to be invited to participate in a guided sourcing event based on the supplier risk levels.

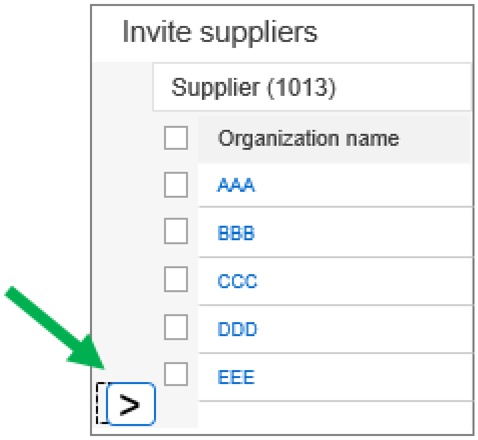
Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.

2. Go to the **Suppliers** panel and click **Invite suppliers**.

   The **Invite suppliers** page opens that lets you search for suppliers.
3. Click the gear icon ( ) in the search panel on the left side of the page.

   The search panel may be collapsed based on screen resolution and browser zoom values. If this occurs, click the expand icon ( ) on the left edge of the of the **Supplier** table to expand the search panel:

   A multi-select dropdown list **Search criteria setting** appears, consisting of several standard filters. For more information about the **Search criteria setting** dropdown, see Manually Inviting Suppliers (Participants) to Guided Sourcing Events [page 266]
4. Select the **Risk Level** checkbox and click **Confirm**.
5. In the **Risk Level** multi-select dropdown, select the risk levels for suppliers. The following options are available in the **Risk level** dropdown:
   - **Low**: Select this option to include suppliers with low risk ratings in your search results.
   - **Medium**: Select this option to include suppliers with medium risk ratings in your search results.
   - **High**: Select this option to include suppliers with high risk ratings in your search results.
   - **Unknown**: Select this option to include suppliers with a risk project associated, but the risk level is not specified.
6. Click **Search**.

   Based on the risk level criteria specified in the **Risk Level** dropdown, suppliers are displayed in the **Suppliers** table.

   In the **Suppliers** table, you can view additional details about suppliers:
   - Click a **Supplier name** hyperlink to open the supplier card. In the supplier card, **Vendor ID** is displayed if your site is integrated with SAP Ariba Supplier Lifecycle and Performance.
     - Click the hyperlink in the **Risk level** field to display the supplier risk card with **Name**, **Score**, and **Risk level** for the supplier.
       - To go back to the supplier card, click the back icon ( ).
       - To close the supplier risk card, click **Close**.
   - The **Risk level** column displays the risk level of suppliers as hyperlinks. The possible values for **Risk level** are **High**, **Medium**, **Low**, and **Unknown**. If there is a risk project associated but the suppliers' risk level information is not available in the system, then the value in the **Risk level** column for the corresponding

supplier is displayed as **Unknown**. When there is no risk project created, the value in the **Risk level** column for the corresponding supplier is displayed as empty.
Click a hyperlink in the **Risk level** column to open the supplier risk card, which displays the following information about the supplier:

- **Name**: The categories on which the risk is measured are displayed.
- **Score**: The **Overall Risk** score for the supplier with the risk score breakdown for each category is displayed in percentage. The value can range between 0 to 100 and can be in decimal.
- **Risk level**: The **Overall Risk** level for the supplier with the risk level breakdown for each category is displayed. The possible values are **High**, **Medium**, **Low**, and **Unknown**.

Saving Supplier Search Filters in Guided Sourcing

You can save the filters for supplier search in guided sourcing. Saved filters are displayed by default every time you access supplier search.

Context

You can save any number of the guided sourcing default filters as well as the filters integrated from SAP Ariba Supplier Lifecycle and Performance as preferred filters. You can modify the saved filters if you wish to. However, nte that only one set of filters is saved at a time and every time you save preferences, the saved filters are overwritten with the new set.

Note that the values specified for the default or integrated filters are not saved; only the filtering options are saved.

> ⓘ Note
>
> You might notice a slight delay in the loading of Custom filters to the **Filters** panel of the **Invite Suppliers** page.

Procedure

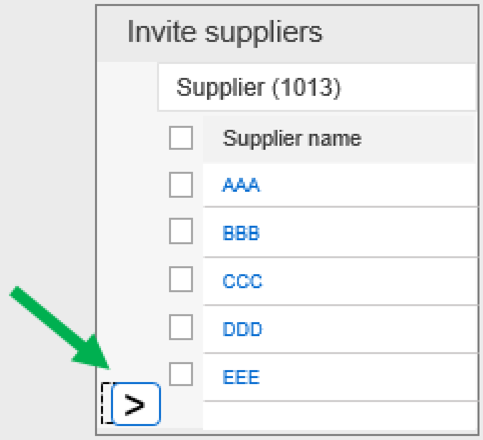
1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Suppliers** panel and click **Invite suppliers**.

   > ⓘ Note
   >
   > The **Invite suppliers** button is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

   A page opens that lets you search for suppliers with a search panel on the left side of the page.

ⓘ Note

The search panel may be collapsed based on your screen resolution and browser zoom values. If this occurs, click the expand icon (>) on the left edge of the of the **Supplier** table to expand the search panel:



You can use either the keyword search box or the search filters in the search panel, or use both to refine search results.

3. To select the search filters, click the gear icon (⚙) in the search panel.

   A multiselect dropdown list **Search criteria setting** appears, consisting of several search filters based on your site configuration.
4. Select the search filters that you want to save.
5. Click **Save preferences**.
6. In the **Save filter preferences** popup, click **Confirm**.

Inviting Suppliers to Guided Sourcing Events Using Intelligent Supplier Recommendations

SAP Ariba Sourcing recommends suppliers to invite to a guided sourcing event based on similar past events.

Data used to generate the recommendation includes item name; event name; department; commodity and region, both at the event and item level; the **MaterialNumber** and **MaterialCode** fields; and supplier history in past events, including invitations and contracts.

For commodity, region, department, MaterialNumber, and contracts, if the data used to train the machine learning model mostly includes values for these fields, they are used in the recommendation. However, if these fields are mostly empty in the training data, they aren't used in the recommendation.

In addition, if you have retrained the machine learning model, data used to make the recommendation also includes past experience with the model. For example, if the model recommends 10 suppliers and the user chooses only six of them, then the next time you retrain the machine learning model, this information is used to refine the model.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- Supplier recommendations work for sites both with and without SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture). To get recommendations based on supplier qualification level, your site needs to have both SAP Ariba Sourcing **and** one of the products mentioned in the previous sentence.
- In the intelligent configuration manager for SAP Ariba solutions, set the parameter **Enable supplier recommendations in guided sourcing events** (`Application.AQS.GuidedSourcing.SupplierRecommendation.Enabled`) to **Yes**. The default is **No**. See Accessing Intelligent Configuration Manager Workspace.
- Train the machine learning model. See Manually Training the Supplier Recommendation Machine Learning Model and Configuring Automatic Training of the Supplier Recommendation Machine Learning Model.

Supplier recommendations are filtered according to the qualification level set in the template rule **Supplier qualification level**

Related Information

Viewing and Adding Recommended Suppliers with Guided Sourcing [page 275]
Accessing Intelligent Configuration Manager Workspace
Manually Training the Supplier Recommendation Machine Learning Model
Configuring Automatic Training of the Supplier Recommendation Machine Learning Model

Viewing and Adding Recommended Suppliers with Guided Sourcing

Use this procedure to view and add recommended suppliers for a guided sourcing event. SAP Ariba recommends suppliers based on event name, item name, commodity, region, department, and supplier qualification level.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- Supplier recommendations work for sites both with and without SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture). To get recommendations based on supplier qualification level, your site needs to have both SAP Ariba Sourcing **and** one of the products mentioned in the previous sentence.
- In the intelligent configuration manager for SAP Ariba solutions, set the parameter **Enable supplier recommendations in guided sourcing events**

(`Application.AQS.GuidedSourcing.SupplierRecommendation.Enabled`) to **Yes**. The default is **No**. See Accessing Intelligent Configuration Manager Workspace.
- Train the machine learning model. See Manually Training the Supplier Recommendation Machine Learning Model and Configuring Automatic Training of the Supplier Recommendation Machine Learning Model.

Supplier recommendations are filtered according to the qualification level set in the template rule **Supplier qualification level**

Context

SAP Ariba uses a machine learning model to recommend suppliers for guided sourcing events based on:

- Item name
- Event name
- Department
- Commodity and region, both at the event and item level
- The **MaterialNumber** and **MaterialCode** fields
- Supplier history in past events, including invitations and contracts

For commodity, region, department, MaterialNumber, and contracts, if the data used to train the machine learning model mostly includes values for these fields, they are used in the recommendation. However, if these fields are mostly empty in the training data, they aren't used in the recommendation.

In addition, if you have retrained the machine learning model, data used to make the recommendation also includes past experience with the model. For example, if the model recommends 10 suppliers and the user chooses only six of them, then the next time you retrain the machine learning model, this information is used to refine the model.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.

If SAP Ariba Sourcing has recommended suppliers for the event, a band appears at the top of the **Suppliers** panel stating **We have** *n* **supplier recommendations.** *n* is the number of suppliers that SAP Ariba Sourcing is recommending.

> **Note**
>
> To get supplier recommendations, you can also click **Add suppliers** in the **Invited suppliers** panel, and then click **From recommendations**.

> **Note**
>
> To hide the supplier recommendations band, click × on the right side of the band.

2. Click **Add suppliers from recommendations** or **Add suppliers** > **From recommendations**.

   The **Add recommended suppliers** panel appears.

- This panel shows all recommended suppliers. The **Recommended for** column shows the number of items the supplier is recommended for. If you click the **items** link, you'll see a popup with the reason the supplier was recommended: invitations to past events, for example.
- At the top of the **Add recommended suppliers** panel, you can search suppliers by organization name, contact name, or supplier ID.
- Click the organization name to open a supplier card with information about the supplier. If your site uses SAP Ariba Supplier Lifecycle and Performance, the information includes the commodities and regions the supplier is qualified for.

3. From the **Add recommended suppliers** panel, click the checkboxes for the suppliers you want to invite. Then, click **Add** at the bottom of the panel. To deselect a supplier after you've selected them, uncheck the checkbox next to the supplier's name. To select all suppliers, click the checkbox next to **Organization name** in the **Add recommended suppliers** panel.

Results

After you click **Add**, the **Invited suppliers** panel shows the added suppliers.

Related Information

Adding Line Items in Guided Sourcing Events [page 337]
Accessing Intelligent Configuration Manager Workspace
Inviting Suppliers to Guided Sourcing Events Using Intelligent Supplier Recommendations [page 274]
Manually Training the Supplier Recommendation Machine Learning Model
Configuring Automatic Training of the Supplier Recommendation Machine Learning Model

Inviting Suppliers with Scoutbee Supplier Discovery

Buyers can use Scoutbee Supplier Discovery to expand their supplier network beyond their established SAP Ariba supplier network and invite new suppliers to participate in guided sourcing events.

Prerequisites

This functionality has the following prerequisites:

- This feature is supported only in the guided sourcing user interface. To use this feature in the guided sourcing user interface, your site must have guided sourcing enabled.
- Your site must have the ICM parameter `Application.AQS.Scoutbee.Enabled` enabled and the parameters listed in Scoutbee integration with guided sourcing configured.

Context

Scoutbee Supplier Discovery provides buyers an opportunity to expand their supplier network and invite newly discovered suppliers to guided sourcing events. To accompish this, you create supplier discovery requests, answer questions about your supplier requirements, and Scoutbee returns suppliers that meet your requirements. When you have your list of applicable suppliers, you can invite them to join SAP Business Network.

> Note
>
> Scoutbee Supplier Discovery requests may take up to 48 hours to return results.

Complete the following steps to use Scoutbee Supplier Discovery to find and invite new suppliers:

Procedure

1. While working in the **Supplier** section of a draft sourcing event, select the down arrow ( ) next to **Invite suppliers** and choose **Scoutbee Supplier Discovery**.
2. Click **Create Demand Request**.
3. Create a title for your request and select a **Request focus**.
4. Enter a product name and other optional details about the product.
5. Enter a **Company type**, **Country/region**, and other optional details about the kind of supplier you are searching for.

   For example, if you have a company in mind already, you can enter the website URL for **Known suppliers**.
6. Click **Review** and review your entries.
7. Click **Create** to create your discovery request.

Results

You will receive an email notification when your request is processed. You can then return to the**Scoutbee Supplier Discovery** dashboard on the **Find new suppliers** page and view your results. If you want to invite a supplier to SAP Business Network, use the **Create supplier request** button, then fill out the required supplier information.

Creating SAP Business Network Discovery Postings in Guided Sourcing

You can utilize SAP Business Network Discovery to expand your supplier network beyond your established SAP Ariba supplier network and invite new suppliers to participate in guided sourcing events.

You can create and publish SAP Business Network Discovery postings for public- and private-sector events in using guided sourcing. SAP Business Network Discovery postings enhance the reach of the events and enable suppliers who are not part of the buyer's supplier network to express their interest to participate in the event. In public-sector events, such suppliers, who express interest, are automatically invited; in private-sector events, buyer users can choose to invite all, some, or none of such suppliers.

Synchronization Between Guided Sourcing Events and SAP Business Network Discovery Postings

Synchronization support is available between guided sourcing events and the associated SAP Business Network Discovery postings. When the guided sourcing event status changes, the behavior of the associated SAP Business Network Discovery posting gets updated. The following table lists guided sourcing event statuses and the behaviors of the associated SAP Business Network Discovery postings:

Guided Sourcing Event Status	SAP Business Network Discovery Posting Behavior
Review responses	The associated SAP Business Network Discovery posting is closed. Hence, suppliers cannot respond to the posting.
Completed	The associated SAP Business Network Discovery posting is closed. Hence, suppliers cannot respond to the posting.
Canceled	The associated SAP Business Network Discovery posting is terminated. Hence, suppliers cannot respond to the posting.
Deleted	The associated SAP Business Network Discovery posting is terminated. Hence, suppliers cannot respond to the posting.
Open	The associated SAP Business Network Discovery posting is open, and suppliers can respond to the posting.
Scheduled	The associated SAP Business Network Discovery posting is in draft. Hence, suppliers cannot respond to the posting until the event is published.

⚠ Restriction

Synchronization support is not available when the guided sourcing events are reopened or paused. When any of these actions are performed for a guided sourcing event, the SAP Business Network Discovery posting closes automatically.

Related Information

Creating SAP Business Network Discovery Postings for Private-Sector Events in Guided Sourcing [page 280]
Importing and Inviting SAP Business Network Discovery Suppliers to Private-Sector Events in Guided Sourcing [page 283]
Creating SAP Business Network Discovery Postings for Public-Sector Events in Guided Sourcing [page 285]

Creating SAP Business Network Discovery Postings for Private-Sector Events in Guided 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.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.
- The parameter **Block classic sourcing creation** (`Application.AQS.RFX.BlockClassicSourcingCreation`) must be enabled for your site.
- 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 feature **SRC-1401** and the parameter `Application.AQS.RFX.EnablePublicSector` must be enabled for your site. Contact SAP Ariba Support to enable the feature and the parameter.

Context

You can create an SAP Business Network Discovery posting specifying your supplier requirements for private-sector events and publish the posting.

Procedure

1. Create a guided sourcing event or open an existing guided sourcing event for editing.
2. Go to the **Suppliers** panel and from the **Invite suppliers** dropdown, select **SAP Business Network Discovery**.

   The **Find new suppliers** page opens.

3. Click **Create SAP Business Network Discovery posting**.

   The **Terms of Use** message box opens if you are a new buyer user.

   > ⓘ Note
   >
   > An enterprise user and a third-party user with the same user ID are considered as a single user in the SAP Business Network Discovery application.

   If you are an existing buyer user, skip step 4 and proceed to step 5.
4. Accept the Terms of Use.

   > ⓘ Note
   >
   > If you are a new buyer user, you can create SAP Business Network Discovery postings, invite suppliers to events with published postings, and perform other activities in the SAP Business Network Discovery application only after accepting the Terms of Use.

5. In the **Let's get started** section in the **Create posting** page, specify the following details:
   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**.
6. 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**.
7. 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**.
8. To save the posting, click **Save draft**.

    To make further edits, click **Edit** and make the required updates.
9. When you're ready to publish the posting, click **Publish**.

    The posting is published.

Next Steps

After the SAP Business Network Discovery posting is published, you can view the list of suppliers shown interest in the posting by clicking **SAP Business Network Discovery** from the **Invite suppliers** dropdown in the **Suppliers** panel in the event page. Review the supplier responses, import, and invite suppliers that meet your requirements.

> ⓘ Note
>
> After the 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 Guided Sourcing [page 283].

Importing and Inviting SAP Business Network Discovery Suppliers to Private-Sector Events in Guided Sourcing

After the SAP Business Network Discovery posting is published for a private-sector event, you can import suppliers into the guided sourcing supplier database and invite suppliers to the event.

Prerequisites

- Your site must be integrated with SAP Business Network Discovery.
- This feature is supported only in the guided sourcing user interface. To use this feature your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group. For more information about enabling guided sourcing, refer to Setting Up Guided Sourcing.
- The SAP Business Network Discovery posting must be published.
- The parameter **Block classic sourcing creation** (`Application.AQS.RFX.BlockClassicSourcingCreation`) must be enabled for your site.
- 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 feature **SRC-1401** and the parameter `Application.AQS.RFX.EnablePublicSector` must be enabled for your site. Contact SAP Ariba Support to enable the feature and the parameter.

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 guided sourcing supplier database and invite them to the private-sector event.

Procedure

1. Open the guided sourcing event.
2. Access the list of interested suppliers.
   - If the event is in the draft stage, go to the **Suppliers** panel in the guided sourcing event page, from the **Invite suppliers** dropdown, select **SAP Business Network Discovery**.
   - If the event is in the monitor stage, go to the **Items that need quotes** panel, click **Invite supplier from SAP Business Network Discovery posting**.

   The **Terms of Use** message box opens if you are a new buyer user.

   > ⓘ Note
   >
   > An enterprise user and a third-party user with the same user ID are considered as a single user in the SAP Business Network Discovery application.

   If you are an existing buyer user, skip step 3 and proceed to step 4.
3. Accept the Terms of Use.

   > ⓘ Note
   >
   > If you are a new buyer user, you can create SAP Business Network Discovery postings, invite suppliers to events with published postings, and perform other activities in the SAP Business Network Discovery application only after accepting the Terms of Use.
4. In the **Find new suppliers** page, you can view the responses and attachments, if any shared by the suppliers.
5. (Optional) If the event is in the draft stage and you want to edit the posting details, click **Edit Posting**.

   The **Create posting** page opens.

   Modify the posting details as required. For more information, refer to Creating SAP Business Network Discovery Postings for Private-Sector Events in Guided Sourcing [page 280].
6. To import suppliers to the guided 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.
7. To invite suppliers to the guided 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 Guided 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.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.
- The parameter **Block classic sourcing creation** (`Application.AQS.RFX.BlockClassicSourcingCreation`) must be enabled for your site.
- 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 feature **SRC-1401** and the parameter `Application.AQS.RFX.EnablePublicSector` must be enabled for your site. Contact SAP Ariba Support to enable the feature and the parameter.
- The event must be created from a guided sourcing template with the **Is the sourcing event for the public sector** rule set to **Yes**.
- The guided sourcing event must be in the draft state.

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. Create a guided sourcing event or open an existing guided sourcing event that hasn't been published.
2. Go to the **Suppliers** panel and from the **Invite suppliers** dropdown, select **SAP Business Network Discovery**.

   The **Find new suppliers** page opens.
3. Click **Create SAP Business Network Discovery posting**.

   The **Terms of Use** message box opens if you are a new buyer user.

   > ⓘ Note
   >
   > An enterprise user and a third-party user with the same user ID are considered as a single user in the SAP Business Network Discovery application.

   If you are an existing buyer user, skip step 4 and proceed to step 5.
4. Accept the Terms of Use.

   > ⓘ Note
   >
   > If you are a new buyer user, you can create SAP Business Network Discovery postings, invite suppliers to events with published postings, and perform other activities in the SAP Business Network Discovery application only after accepting the Terms of Use.
5. In the **Let's get started** section in the **Create posting** page, specify the following details:
   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**.
6. 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**.
7. 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**.
8. To save the posting, click **Save draft**.

   To make further edits, click **Edit** and make the required updates.
9. 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.

Accessing Supplier 360° Profile from Guided Sourcing

While creating or editing a sourcing event in the guided user interface of SAP Ariba Sourcing, you can click the name of a supplier in the **Supplier Card** to access the supplier 360° profile for the supplier.

Prerequisites

Your SAP Ariba Sourcing site must have an active integration with SAP Ariba Supplier Management solutions.

Context

The supplier 360° profile in SAP Ariba Supplier Management solutions shows all of the information your organization has collected about a supplier. You can navigate to the supplier 360° profile from the list of suppliers or supplier search results in a guided sourcing event that you create or edit in the guided sourcing user interface of SAP Ariba Sourcing.

Procedure

1. While creating or editing a sourcing event in the guided sourcing user interface of SAP Ariba Sourcing, go to the **Suppliers** tab of the event.
2. If the **Suppliers** table shows the supplier for which you want to view the supplier 360° profile, click the name of the supplier.

   If the supplier for which you want to view the supplier 360° profile is not available in the **Invited Participants** table, click **Invite Participants** and search for the supplier.

   From the **Search Results**, click the name of the supplier.

   The **Supplier Card** for the selected supplier appears.

   > → Tip
   >
   > The **Supplier Card** shows a vendor ID for suppliers available in SAP Ariba Supplier Management solutions,
3. Click the name of the supplier from the **Supplier Card**.

   The supplier 360° profile for the selected supplier appears.
4. Navigate to the relevant sections of the supplier 360° profile based on the information you are looking for.

5. To go back to the SAP Ariba Sourcing interface, click the **Back** link that appears on the top-left corner of the page.

> Note
>
> If you have navigated to various sections of the supplier 360° profile, you need to click the **Back** link multiple times to navigate back to the **Summary** page of the the supplier 360° profile and from there to the SAP Ariba Sourcing interface.

Linking or Unlinking Supplier Risk Engagement Projects from a Guided Sourcing Event

You can link or unlink existing supplier risk engagement projects from a guided sourcing event.

Prerequisites

- Your site must be integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Management solutions.
- This feature is supported only in the guided sourcing user interface. This feature adds support in guided sourcing for viewing supplier risk information. Your site must be set up for guided sourcing.
- You must be a member of the **Category Buyer** group to create and run guided sourcing events. For more information, refer to Managing events with guided sourcing.
- Supplier must be invited to the guided sourcing event.

Context

You can link existing supplier risk engagement projects to a guided sourcing event and seamlessly navigate between the supplier risk engagement projects and the supplier card in the guided sourcing.

Procedure

1. Open the guided sourcing event where you want to link or unlink a supplier risk engagement project.
2. Click **Edit**.
3. Click the supplier name to open the supplier card for the supplier.
4. In the supplier card, click the **Linked Risk Projects** tab.

   The **Linked Risk Projects** tab displays the following UI elements:
   - **Display** dropdown that contains the following options:

    - **Linked Projects**: Select this option to view the risk engagement projects for the selected supplier and are linked to the guided sourcing event. Until you link a risk engagement project to the sourcing event, this displays a value of zero to indicate that there is no linked project.
    - **Unlinked Projects**: Select this option to view the risk engagement projects for the supplier, but are not linked to the guided sourcing event.
    - **All Projects**: Select this option to view all risk engagement projects linked to the supplier. You can view all the risk engagement projects in the *Submitted* state.
  - **Project Name** column: Click the project name link to open the *Engagement Request Details* page for a supplier risk engagement project. The *Engagement Request Details* page displays the details of the corresponding supplier risk engagement project such as owner, project status, commodity, residual risk, and inherent risk. To navigate back to the guided sourcing event, click the **Back to event** link at the top of the *Engagement Request Details* page.
  - **Owner** column: Displays the owner of the corresponding supplier risk engagement project.
  - **Commodity** column: Displays the commodity for the corresponding supplier risk engagement project.
  - **Project Status** column: Displays the project status for the corresponding supplier risk engagement project.
  - **Inherent Risk** column: Displays the inherent risk score for the corresponding supplier risk engagement project.
  - **Residual Risk** column: Displays the residual risk for the corresponding supplier risk engagement project.
  - **Linked State** column: Displays the link status for the corresponding supplier risk engagement project. Possible values: **Linked**, **Unlinked**
  - **Link**: Click the button to establish a link between the selected supplier risk engagement projects and the guided sourcing event.
  - **Unlink**: Click the button to remove links between the selected supplier risk engagement projects and the guided sourcing event.
5. In the **Linked Risk Projects** tab, you can link or unlink existing supplier risk engagement projects from a guided sourcing event.
  - To link supplier risk engagement projects with the guided sourcing event, perform the following steps:
    1. In the **Display** dropdown, select **Unlinked Projects**.
       The supplier risk engagement projects that are not linked to the guided sourcing event are displayed.
    2. Select the checkboxes corresponding to the **Project Name** for the supplier risk engagement projects that you want to link to the guided sourcing event.
    3. Click **Link**.
       The selected supplier risk engagement projects are linked to the guided sourcing event.
  - To unlink supplier risk engagement projects from the guided sourcing event, perform the following steps:
    1. In the **Display** dropdown, select **Linked Projects**.
       The supplier risk engagement projects that are linked to the guided sourcing event are displayed.
    2. Select the checkboxes corresponding to the **Project Name** for the supplier risk engagement projects that you want to unlink from the guided sourcing event.
    3. Click **Unlink**.
       The selected supplier risk engagement projects are delinked from the guided sourcing event.
6. Click **Close** to close the supplier card.

Designating Suppliers as Incumbents in Guided Sourcing Events

Use this procedure to mark suppliers currently in use as incumbent suppliers in guided sourcing events.

Context

Buyers can mark suppliers as incumbent suppliers at the event level and line-item level. If the incumbency status for a supplier at the event and line-item levels are different, the line-item level status takes precedence. At the event level, you can mark the incumbent status in the Suppliers section of an event. At the line-item level, you can designate suppliers as incumbents by either editing individual line items or bulk-editing multiple line items.

> ⓘ Note
>
> To designate suppliers as incumbents, you must select at least one supplier as an incumbent at the event level.

You can view the participating suppliers and their incumbency status in the Items table and on the Monitor and Award pages of an event.

> ⚠ Restriction
>
> - Incumbent supplier optimization scenario at the item level is currently not supported in guided sourcing. Hence, if you select a supplier as an incumbent only at the item level, it is recommended to manually create an optimization scenario.
> - Currently, you can create or edit optimization scenarios only for single-round events.

To designate suppliers as incumbents at the event level, do the following:

Procedure

1. From the guided sourcing UI, open the event in which you want to designate suppliers as incumbents.
2. Navigate to the **Suppliers** section of the event.
3. In the **Is this an incumbent supplier?** column, turn on the toggle for the supplier that you want to mark as an incumbent.

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Related Information

Adding Suppliers (Participants) to Guided Sourcing Events [page 263]
Designating Suppliers as Excluded in Draft Events [page 292]

Designating Suppliers as Excluded in Published Events [page 293]
Creating Supplier Organizations in Guided Sourcing Events [page 294]
Creating a Supplier Request in Guided Sourcing Events [page 296]
Creating New Supplier Contacts in Guided Sourcing Events [page 299]
Editing Supplier Contact Information in Guided Sourcing Events [page 301]
Automatic Addition of Preferred Suppliers in Guided Sourcing [page 303]
Editing Line Items in Guided Sourcing Events [page 343]

Designating Suppliers as Excluded in Draft Events

You can mark suppliers who do not meet the participating criteria as excluded in guided sourcing draft events.

Prerequisites

- Your site must be set up for guided sourcing and you must be a member of **Category Buyer** group.
- You must either be the event owner or have project owner capabilities for the event.

Context

You can mark suppliers as excluded at the event level.

> ⓘ Note
>
> Marking suppliers as excluded is only a visual representation to help you decide whether to award the bid to excluded suppliers. It does not prevent them from participating in the event.

Procedure

1. From the guided sourcing UI, open the event in which you want to mark suppliers as excluded.
2. Navigate to the **Suppliers** panel of the event.
3. In the **Is this an excluded supplier?** column, turn on the toggle for the supplier that you want to mark as excluded.
4. Alternatively, if the event has a predecessor project that has suppliers marked as excluded, you can retain the excluded status while importing suppliers.

   > ⓘ Note
   >
   > For more information about linking a guided sourcing project as a predecessor project, see Creating and Using Multi-Stage Projects [page 131]

a. From the **Invite Suppliers** dropdown, choose **Add supplier from predecessor project**.

   The **Add supplier from predecessor project** popup appears.
b. Choose the suppliers you want to invite.

   The suppliers are added to the **Suppliers** panel. You can view their exclusion status.
c. (Optional) Change the exclusion status of the suppliers in the **Is this an excluded supplier?** column.

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Designating Suppliers as Excluded in Published Events

Prerequisites

- Your site must be set up for guided sourcing and you must be a member of **Category Buyer** group.
- You must either be the event owner or have project owner capabilities for the event.

Context

In a published guided sourcing event, you can mark suppliers as excluded either in the **Items that need quotes** or in the **Questions, requirements, and attachments** panel.

> Note
>
> Marking suppliers as excluded is only a visual representation to help you decide whether to award the bid to excluded suppliers. It does not prevent them from participating in the event.

Procedure

1. Open the event in the **Monitor** phase in which you want to designate excluded suppliers.
2. In the **Items that need quotes** panel in the event, click the three dots next to the supplier and choose **Mark as excluded supplier**.

   The excluded suppliers are marked with ( ) icon and are sorted to the right of the table. The changes that you make in this panel are also reflected in the **Questions, requirements, and attachments** panel.
3. To hide the excluded suppliers, click the ( ) icon at the top right of the panel and choose **Hide excluded**.

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Designating Suppliers as Incumbents in Guided Sourcing Events [page 291]
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Creating Supplier Organizations in Guided Sourcing Events

This procedure describes how create new supplier **organizations** in guided sourcing 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 296] to create a new supplier request in guided sourcing events instead.

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

You must also be a member of one of the following groups:

Category Manager
Commodity Manager
Customer Administrator
Event Administrator
Limited Event Administrator
Sourcing Project Administrator
Supplier/Customer Agent
Supplier/Customer Manager
Supplier/Customer User Agent
Supplier Project Administrator

Context

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 provide information about a supplier, and SAP Ariba creates a supplier organization that must be approved before you can invite it to events. The approval requirements for supplier organizations depend on the supplier management method your site uses.

- In sites that do not use any of the SAP Ariba Supplier Management solutions (SAP Ariba Supplier Information and Performance Management, classic or new architecture, or SAP Ariba Supplier Lifecycle and Performance), supplier organizations created by users in the following groups are approved by default:
  - **Supplier/Customer Manager**
  - **Event Administrator**
  - **Commodity Manager**
  - **Sourcing Manager**

  Members of the **Supplier/Customer Agent** group can create unapproved supplier organizations, but a member of one of the above groups must approve the supplier organizations.
- In sites that use SAP Ariba Supplier Information and Performance Management (classic architecture), the approval process for suppliers is defined by your site's supplier workspace template and might allow automatic approvals.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Suppliers** panel and click **Add suppliers**.
   A supplier search page opens.
3. Search to see if the supplier already exists. If not, click **Create** > **New Supplier**.
   The **Create new supplier** page opens.
4. Enter an internal name for the organization in the **Organization Name** field.

This name can be the same name the supplier uses in their SAP Business Network for suppliers profile, and which is displayed in the **Public Company Name** field, but it does not have to be.

5. **Optional:** (Optional) Enter any single-line text value in the **Type of Organization** field; for example, **Financial Services** or **Non-Profit**. You can use **Type of Organization** values as a search criterion when searching for suppliers.
6. If the organization you are creating is a part or subsidiary of an existing organization in your site, choose that organization from the **Parent** pull-down menu.
7. Enter initial profile information for the organization, such as address, phone number, and approved commodities. Values for some of these fields may be overwritten by (synchronized with) values from the supplier's SAP Business Network for suppliers profile, as listed in Common Supplier Profile Fields.
8. Enter information about contact information for the organization, such as email address and phone number.
9. Answer any questions in the supplier profile questionnaire that are marked **Owner Required**. These questions are usually for internal use and are only visible in a supplier's SAP Business Network for suppliers profile if they are set to be visible to suppliers.

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Creating a Supplier Request in Guided Sourcing Events

This procedure describes how to create supplier requests (**not** supplier organizations) in guided sourcing events. You can'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 must instead use this procedure [page 294] to create new supplier organizations in events.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must also be a member of one of the following groups:

  SM Ops Administrator
  Supplier Registration Manager
  Supplier Request Manager

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. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Invited suppliers** panel and click **Add suppliers**.

   A supplier search page opens.
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 the request is approved, n additional process is used to register the supplier. In sites with SAP Ariba Supplier Lifecycle and Performance, additional processes can be used to qualify and set preference levels for the supplier according to combinations of commodities and regions.

By default, you can invite a supplier to an event after the supplier request is approved and the supplier is created. However, **Supplier Eligibility Criteria** rules set in the event template can specify a supplier registration or qualification status to participate in events.

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

Check the status of your supplier request in the **My Activities** area of the **Supplier Management** dashboard.

After the supplier request is approved and any required supplier registration or qualification status is attained, invite the supplier to the event.

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Creating New Supplier Contacts in Guided Sourcing Events

Use this procedure to create new supplier contacts in guided sourcing events. You invite individuals, or contacts, in supplier entities (companies or organizations) to participate in your event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

- 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

Context

A contact is a person who is a member of a supplier or supplier organization. When you publish your event, invited supplier contacts receive email invitations. You can configure multiple contacts for the same supplier.

> ⓘ Note
>
> When the **Can project owner create response team by default** rule is set to **Yes**, the grouped contacts cannot be ungrouped. For more information, see Can project owner create response team by default.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event** .
2. Go to the **Invited suppliers** panel and click **Add suppliers**.

   A supplier search page opens.
3. Click **Create** > **New Contact** .

   The **Create new contact** page opens.
4. In the **Organization name** field, enter search terms for the supplier that you want to add the contact to.

   The search matches organization names that contain the search terms. Differences between uppercase and lowercase are ignored.
5. Select the supplier that you want to add the contact to.

   If there are no matches for the supplier and your site uses supplier organizations, you can create a new supplier organization [page 294]. If your site does not use supplier organizations, you can create a supplier request [page 296].
6. Enter information about the contact.

The **User ID** must be unique for all contacts (users) in all supplier organizations.

- If your site uses supplier organizations, the **User ID** identifies the contact for web services and for exporting and importing event information from Excel documents.
- If your site does not use supplier organizations, the **Business email address** must also be unique for all contacts in all suppliers. SAP Ariba Supplier Lifecycle and Performance uses the **Business email address** to construct a user ID that identifies the contact for web services and for exporting and importing event information from Excel documents. The **User ID** is used only as an internal identifier.

7. Click **Create**.

Results

Depending on the supplier management solution used by your site and how the solution is configured, the contact may need to be approved by another user in your organization.

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Editing Supplier Contact Information in Guided Sourcing Events

Use this procedure to edit supplier contact information from a guided sourcing event.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

Occasionally, you might want to edit a supplier contact's details while you are working in a guided sourcing event. You can edit a supplier contact's **First Name**, **Last Name**, **Business email address**, and **Phone** details without exiting your guided sourcing event. While working in a guided sourcing event that is in **Draft** state, complete the following steps:

Procedure

1. Click a supplier name from the **Suppliers** event section.

   > ⓘ Note
   >
   > You can also use **Add Suppliers** to find a supplier and edit that supplier's contacts.

2. On the popup screen, click the **Contacts** tab.
3. Click the edit icon ( ) on the right side of a contact entry.
4. Edit any of the following fields:
   - **First Name**
   - **Last Name**
   - **Phone**
   - **Business email address**
5. Click **Update**.

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Automatic Addition of Preferred Suppliers in Guided Sourcing

Buyer users having SAP Ariba Sourcing integrated with SAP Ariba Supplier Lifecycle and Performance (SLP) can create sourcing projects where preferred suppliers are added automatically based on certain conditions.

Preferred suppliers are those suppliers with whom you've indicated a desirability to do business for a specific combination of commodities, regions, and departments. In guided sourcing, you can create a configuration to automatically add such suppliers to the sourcing events that are based on the specific combinations of commodities and region values.

Automatic addition of preferred suppliers can be set up either at an item or event level.

Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers [page 303]

Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Event Level [page 305]

Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Item Level [page 307]

Parent topic: Suppliers (Participants) in Guided Sourcing Events [page 263]

Related Information

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Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers

Use this procedure to enable automatic addition of preferred suppliers to single-event projects by configuring the guided sourcing template.

Prerequisites

- SAP Ariba Sourcing must be integrated with SAP Ariba Supplier Lifecycle and Performance.

- 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 enable guided sourcing to automatically invite preferred suppliers for single-event projects at the event or the item level. To do so, you must configure the necessary supplier qualification criteria in the project template.

Procedure

1. Select **Manage** > **Templates** from the home page or click **Manage templates** in the Quick links section of the **For You** dashboard.
2. Select **Actions** > **Create** > **Template** on the resultant page.
3. Select **Sourcing Project** as the project type.
4. Provide a name for the template and set the template for a **Quick Project**.
5. Select an event type as appropriate.

    > Note
    >
    > Ensure that you select the event type as **RFP**, **RFI**, or **Auction** as only these qualify as guided sourcing single-event projects.

6. Select **Guided Sourcing Template** as **Yes**.
7. Click **OK**.

    The project template is initialized.
8. Edit the document under the **Documents** section.
9. Under the **Supplier Eligibility Criteria** section, select a value from the **Supplier qualification level** dropdown.

    You can enable guided sourcing to automatically add suppliers at the **Event Level** or **Item Level**.

You can also define how the rule appears to users working on the sourcing event. Depending on your selection, the rule is hidden or shown as read-only on the **Set event rules** page under the **Supplier eligibility criteria** section.

10. Select a value from the **Automatically invite preferred suppliers** dropdown.

    This dropdown has values corresponding to the value selected in the **Supplier qualification level** dropdown.

    > Example
    >
    > If the supplier qualification level is set at the **Event Level**, the **Invite to Event** option is available for selection under the **Automatically invite preferred suppliers** dropdown.

    You can also define how the rule appears to users working on the sourcing event. Depending on your selection, the rule is hidden or shown as read-only on the **Set event rules** page under the **Supplier eligibility criteria** section.
11. Go through the remaining steps in the wizard and complete the configuration process.

Results

The project template is now configured to automatically add preferred suppliers as per their qualification level. All single-event guided sourcing projects created using this template are eligible for automatic addition of preferred suppliers if the required conditions are met.

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Related Information

Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Event Level [page 305]
Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Item Level [page 307]

Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Event Level

Based on the guided sourcing template configuration and project details you provide, preferred suppliers are automatically added to the event. Use this procedure to set the configuration.

Prerequisites

- SAP Ariba Sourcing must be integrated with SAP Ariba Supplier Lifecycle and Performance.

- The guided sourcing template must be configured to automatically add preferred suppliers at the event level. For more information, see Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers [page 303]

Context

The **Commodity** and **Region** values that you select while defining the project details of your sourcing event are used to fetch preferred suppliers from SAP Ariba Supplier Lifecycle and Performance.

Procedure

1. Select **Create** > **Guided sourcing event** from the home page.
2. Under the **Set up event** section, select **Create from template**.
3. Provide a name for the event and select an event type as applicable.
4. Under the **Enter event information** section, select **Commodity** and **Regions** values as applicable.
5. Under the **Choose Template** section, select a template.

> ⓘ Note
>
> The template you select must be configured to automatically add preferred suppliers at the event level, as mentioned in the **Prerequisites** section.

6. Provide other details as necessary and click **Create**.

Results

The guided sourcing project is created. Under the **Suppliers** tab,

- Preferred suppliers (if any) are automatically added based on the **Commodity** and **Region** values selected for the event.

> ⓘ Note
>
> You can change the region or commodity anytime before the event is published. However, the automatically-added suppliers are not removed as a result, but their preferred status can change.

- A preferred supplier can be identified by the following attributes:
  - **Preferred**: **Yes**
  - **Qualification Status**: **Qualified**
  - **Auto-Invited**: **Yes**
- If a preferred supplier is automatically added, the following message is displayed: **You are automatically inviting preferred suppliers to this event**.

Next Steps

Here are a few related actions that you can perform:

- View supplier details: Click on the supplier name. A popup displays details such as basic supplier information, primary contact information, sourcing activity, qualifications, and so on.
- Remove a supplier automatically added to the event: Select the checkbox against the supplier entry and select **Uninvite**.
- Manually add other suppliers: Click **Invite Suppliers**.

> Note
>
> The **Invite suppliers** and **Uninvite** buttons are available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

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Related Information

Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers [page 303]
Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Item Level [page 307]

Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Item Level

Based on the guided sourcing template configuration and item information you provide, preferred suppliers are automatically added to the event. Use this procedure to set the configuration.

Prerequisites

- SAP Ariba Sourcing must be integrated with SAP Ariba Supplier Lifecycle and Performance.
- The guided sourcing template must be configured to automatically add preferred suppliers at the item level. For more information, see Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers [page 303].

Context

The **Commodity** and **Region** values that you select while adding an item to your sourcing event are used to fetch preferred suppliers from SAP Ariba Supplier Lifecycle and Performance.

Procedure

1. Select **Create** > **Guided sourcing event** from the home page.
2. Under the **Set up event** section, select **Create from template**.
3. Provide a name for the event and select an event type as applicable.
4. Under the **Choose Template** section, select a template.

   > ⓘ Note
   >
   > The guided sourcing template you select must be configured to automatically add preferred suppliers at the item level, as mentioned in the **Prerequisites** section.

5. Provide other details as necessary and click **Create**.

   The guided sourcing project draft is created.
6. Select the **Items that need quotes** tab.
7. Select **Add** > **Item** .
8. Provide a name and description for the item.
9. Select **Commodity** and **Region** for the item.
10. Provide other details as necessary and click **Add**.

Results

The item is added to the event. Under the **Suppliers** tab,

- Preferred suppliers (if any) are automatically added based on the **Commodity** and **Region** values selected for the item.

  > ⓘ Note
  >
  > - You can change the **Commodity** and **Region** values of the line item anytime before the event is published. However, the automatically-added suppliers aren't removed as a result, but their preferred status can change.
  > - If you change the **Commodity** and **Region** values, you must select **Refresh Invitees** so that preferred suppliers are fetched again based on the latest values selected. On save, the preferred suppliers list and their qualification status is updated accordingly but existing suppliers aren't removed.

- A preferred supplier can be identified by the following attributes:
  - **Preferred**: **Yes**

    - **Qualification Status**: **Qualified**
    - **Auto-Invited**: **Yes**

> ⓘ Note
>
> The **Preferred** and **Auto-Invited** attributes are set to **Yes** if a supplier is qualified as preferred for at least one line item.

- If a preferred supplier is automatically added, the following message is displayed: **You are automatically inviting preferred suppliers to this event**.

Next Steps

Here are a few related actions that you can perform:

- View supplier details: Click on the supplier name. A popup appears where you can see details such as basic supplier information, primary contact information, sourcing activity, qualifications, and so on.
- Remove a supplier automatically added to the event: Select the checkbox against the supplier entry. Then select **Uninvite**.
- Manually add other suppliers: Click **Invite Suppliers**.

> ⓘ Note
>
> The **Invite suppliers** and **Uninvite** buttons are available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

- Edit the line item: Click ••• *(More actions)*. Then select **Edit item**.

> ⓘ Note
>
> If you change the **Commodity** and **Region** values, you must select **Refresh Invitees** so that preferred suppliers are fetched again based on the latest values selected. On save, the preferred suppliers list and their qualification status is updated accordingly but existing suppliers aren't removed.

Task overview: Automatic Addition of Preferred Suppliers in Guided Sourcing [page 303]

Related Information

Configuring a Guided Sourcing Project Template to Automatically Add Preferred Suppliers [page 303]
Setting a Guided Sourcing Event to Automatically Add Preferred Suppliers at the Event Level [page 305]

Importing Content for Guided Sourcing Events

You can import content from Excel documents to guided sourcing events. You can also import content from the sourcing library and other guided sourcing events.

About Importing Event Content from Excel Files

You can choose any of the following options to import event content such as line items, questions, and sections from Excel files:

- **My own format (smart import)**: Use the smart import feature to create an RFP from an Excel file that contains content in your preferred format. SAP Ariba generates event content from your file by matching its contents with the correct SAP Ariba Sourcing event content types.
- **SAP Ariba Simplified format**: Use the simplified format to make simple updates to line items and questions in guided sourcing events that are in draft or published state. The format of the simplified Excel file is defined by SAP Ariba.
- **SAP Ariba Standard format**: Use the standard format to import either event content (such as items, questions, and requirements) or participants, or import both event content and participants. The format of the standard Excel file is defined by SAP Ariba.

Parent topic: Importing Content for Guided Sourcing Events [page 310]

Related Information

Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324]
Show Unspecified for empty or invalid term value

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature

This procedure demonstrates how to use the smart import feature to import content for an RFI, RFP, or an Auction event from an unstructured Excel file.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- 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.
- The Smart import from Excel for guided sourcing events [page 676] 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 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. The smart import from Excel feature only uploads content from the first worksheet in the Excel file.
- Ensure that the first row of the Excel file contains the header information.

  > Note
  >
  > The first row of the table is always interpreted as the header row.
- The currency format in the Excel file must match the format used for the event **Currency**.

Context

You can use the smart import from Excel feature to import event content from an Excel document in your own format and have SAP Ariba use machine intelligence to import event content from your file by matching its contents with the correct SAP Ariba Sourcing event content types. The import data may or may not be in a structured format. You can use a multi-sheet Excel file to import content for different event content types.

You can add content using smart import when you create a guided sourcing event or while editing a draft event. Alternatively, you can import event content from an Excel document in a specific format [page 317] defined by SAP Ariba.

> Note
>
> - The smart import from Excel feature allows you to either update or overwrite the existing content in your guided sourcing event.
> - You cannot use this feature to import prerequisites (a question with the option **Is this a prerequisite question** set to any value other than **No, not a prerequisite question**).

- You cannot use this feature to import attachments. You cannot include any attachments when you import (upload) contents from Excel.
  You can use this feature to import a question with the response type **Attachment**, but you cannot upload an initial value or reference value.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Click ••• *(More actions)* and choose **Import content from Excel**.

   Alternatively, you can go to the **Items that need quotes** section or the **Questions, requirements, and attachments** section, click *(Excel import/export)* and choose **Import content from Excel**.
3. On the **Choose import method and upload file** popup, choose the following:
   - **My own format (use smart import)** from the **What format is your Excel document?** section.
   - **Add or Edit event content** or **Replace event content** from the **Do you want to add or replace event content?** section.
     If you choose **Add or Edit event content**, SAP Ariba updates the existing event entries and if you choose **Replace event content**, SAP Ariba overwrites the existing event entries.

   > Note
   >
   > When you import content from Excel for an event in the draft state, you can select the format of the Excel document that you wish to import and choose whether to replace the event content or update the event content. When you import content from Excel for an event in the open state, you can select the format of the Excel document that you wish to import and choose to update the event content.
4. Click **Next**.
5. From the **Drop a spreadsheet, or browse** link on the **Import content to your event from a spreadsheet** 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**.

   > 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. A sheet is mapped to the most-relevant event content type for the information in the sheet. If no matching content type is identified, the sheet is listed under the **Worksheets that will not be imported**.
6. Review the sheet mappings in the **Manage worksheets** popup.
   a. If any mapping is incorrect, modify the mapping by choosing 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.
> - For any column mapped to a term with the **Answer type** that is **Quantity**, the **Unit of Measure** for the term defaults to **each**.
> - Only for auction events, 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.

7. If you are importing line-items, review the item-level mappings from the **Preview items** tab. For more information about item-level mapping, see Reviewing Item-Level Mappings [page 97].
8. If you are importing questions, review the imported questions and the system-generated mappings for the questions from the **Preview questions** tab.
   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.

9. If you are importing requirements, review the requirements from the **Preview requirements** tab. 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 edit mappings that need to be edited, 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).

Results

Based on your selection in the **Choose import method and upload file** popup, SAP Ariba overwrites or updates any existing entries in the **Items that need quotes** and **Questions, prequisites, and attachments** tables with the items and contents shown in the mapping table.

Task overview: About Importing Event Content from Excel Files [page 310]

Related Information

Smart Importing Line Items Linked to Material Master [page 314]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Importing Event Data from a Standard Excel Document [page 322]
Improving Import Performance for Large Files with Formulas [page 324]

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 [page 676] 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 [page 91] or the create an RFP event workflow.

    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 95].

   > ⓘ 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 97].
7. From the **Preview questions** tab, review the mappings for the questions.

   For more information about reviewing questions, see Reviewing Mappings for Questions [page 100].
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.

Task overview: About Importing Event Content from Excel Files [page 310]

Related Information

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Importing Event Data from a Standard Excel Document [page 322]
Improving Import Performance for Large Files with Formulas [page 324]

Importing Guided Sourcing Line Items with the Simplified Excel Import Feature

Use this procedure to import line items and sections from an Excel document in a fixed format defined by SAP Ariba. In a draft event, you can choose to update the existing content or replace it with the content in the simplified format Excel sheet. In a published event, you can only update the content, but not replace it. You must use different Excel files to import line items and questions.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

This topic describes how to import line items and sections into a draft or published event from an Excel document with a fixed format defined by SAP Ariba.

Alternatively, you can use the smart import from Excel [page 311] feature to import event contents from an Excel document with your own format and have SAP Ariba map your entries to line items using machine intelligence to determine which entries are line items. SAP Ariba also maps Excel column entries to terms for line items.

Guided sourcing uses the **Simplified Excel Import** feature to import event line items and questions from an Excel document with a format defined by SAP Ariba.

> ⓘ Note
>
> - 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 ability to make items read-only for event participants is not supported for Simplified Microsoft Excel.
> - To view the pricing items in the spreadsheet, use the **SAP Ariba Standard format (items/questions/participants)** option.

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

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon) in the upper-right corner of the event page and select **Event options** **Edit event** .
2. Go to the **Items that need quotes** panel. Add a sample line item that contains all terms (including custom terms) you want to use for all line items.
3. Click the Excel icon ( ) and select **Download to Excel**.
4. In the **Export the lookup sheet as well?** popup, choose if you want to include a **LookUp** worksheet with commodity and region descriptions and ID values you can use for the **Commodity** and **Region** columns in the **LineItems** worksheet.

   Selecting **Yes** to include a **LookUp** worksheet increases the time for the download operation.
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 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`.

6. Save your changes.
7. Click the Excel icon ( ) and select **Import content from Excel**.
8. In the **Choose import method and upload file** popup, choose **SAP Ariba Simplified format (items/questions only)**.
9. Choose **Line Items** or **Questions, requirements**.
10. Choose one of the following:
    - **Add or Edit event content**
    - **Replace event content**
11. Use the file upload area (**Drag and drop a "Simplified" format Excel sheet, click to browse**) to drag and drop or select your edited Excel file.
12. Click **Import**.

Task overview: About Importing Event Content from Excel Files [page 310]

Related Information

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Smart Importing Line Items Linked to Material Master [page 314]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Importing Event Data from a Standard Excel Document [page 322]
Improving Import Performance for Large Files with Formulas [page 324]

Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature

Use this procedure to import questions and requirements from an Excel document in a fixed format defined by SAP Ariba to a guided sourcing event.

Context

You can use the **Simplified Excel Import** feature to import questions and requirements from an Excel document with a format defined by SAP Ariba to a guided sourcing event.

> Note
>
> The import operation deletes any existing content in the **Questions, requirements, and attachments** table, then replaces it with the contents of the imported Excel document.

Restriction

- You cannot use this feature to export or import prerequisites.
  If your event contains a prerequisite (a question with the option **Is this a prerequisite question** set to any value other than **No, not a prerequisite question**), the prerequisite is exported and imported as a question that is not a prerequisite.
- You cannot use this feature to export or import attachments.
  If event contains an attachment, the attachment is ignored when you export (download) the contents to Excel. You cannot include any attachments when you import (upload) contents from Excel.
  You can use this feature to import a question with the response type **Attachment**, but you cannot upload an initial value or reference value.
- You cannot use the simplified Excel file as data for the Import Sourcing Event web service.

If you cannot or do not want import to content from an Excel document, you can add items, one at a time, by clicking the **Add** button in the **Questions, requirements, and attachments** panel.

The **Simplified Excel Import** operation includes a step to export a template with the current questions and requirements in your event. The template contains just 1 worksheet that you fill in, **Content**, and an instruction sheet (**Design Instructions**). The **Content** worksheet contains:

- A header row in blue.
- Columns for the question or requirement text (**Name**) or the section description, and columns that specify the response type, acceptable values, and other information.
- 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 **Content** worksheet with help text rows removed. It contains a section, **Please respond** with 2 questions below it (**Is air shipping available** and **Lead time, in days**). The question **Lead time, in days** has 3 possible values (30, 60, 90), with the default value 60; these values will be shown to participants in a dropdown list. The worksheet also contains the question **Attach your Q4 schedule** with the response type **Attachment**.

System ID	* Type	* Number	* Name	Description	* Answer Type	Response Required?	Visible to Participant ?	Default	Unit of Measure	Acceptable Values	Allowed Values	Allow participants to select multiple values?
	Section	1.0	Section 1	Please respond			Yes					
	Question	1.1	Is air shipping available?		Yes / No	Yes, participants must respond	Yes	No		Any Value		
	Question	1.2	Lead time, in days		Whole Number	Yes, participants must respond	Yes	60		List of Choices	30|60|90	No
	Question	2.0	Attach your Q4 schedule		Attachment	Yes, participants must respond	Yes			Any Value		

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Questions, requirements, and attachments** panel.
3. Click the Excel icon ( ) and select **Download to Excel**.
4. When the download completes, choose to either open the template in Microsoft Excel or save it, then open it. Add or edit rows in the **Content** worksheet.

> **Note**
>
> - Do not remove the blue header row.
> - Any existing questions and requirements in the event will be deleted and replaced by the contents of the Excel document. If you already had questions or requirements in your event that you want to retain, do not remove the entries for these items.

5. Save your changes.
6. Click the Excel icon ( ) and select **Import content from Excel**.
7. In the **Choose import method and upload file** popup, choose **SAP Ariba Simplified format (items/questions only)**.
8. Choose **Questions, requirements**.
9. Choose one of the following:
   - **Add or Edit event content**
   - **Replace event content**
10. Use the file upload area (**Drag and drop a "Simplified" format Excel sheet, click to browse**) to drag and drop or select your edited Excel file.
11. Click **Import**.

Task overview: About Importing Event Content from Excel Files [page 310]

Related Information

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Smart Importing Line Items Linked to Material Master [page 314]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Event Data from a Standard Excel Document [page 322]
Improving Import Performance for Large Files with Formulas [page 324]
Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]
Adding Questions and Prerequisites to Guided Sourcing Events [page 391]
Adding Requirements and Attachments to Guided Sourcing Events [page 397]

Importing Event Data from a Standard Excel Document

Use this procedure to import event data from a standard Excel document.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must enable autocorrection of row numbers of items on the **Pricing Conditions** tab by setting the ICM parameter **Autocorrect row numbers of Pricing Conditions in SAP Ariba standard format Excel files** (**Application.ACM.AutocorrectAPCExcelExportRowNumbering**) to **Yes** for your site. For more information, please see Autocorrect row numbers of Pricing Conditions in SAP Ariba standard format Excel files.

Context

You can choose to import either event content (items, questions, and requirements) or participants, or choose both from a standard Excel document. You can also choose to add or replace the existing event content. If the standard Excel document contains pricing conditions for items, the pricing conditions are also imported to the guided sourcing event.

> ⓘ Note
>
> - When you select participants, you can only add the supplier data to the guided sourcing event. You cannot replace the supplier data in the existing guided sourcing event with the new content from the standard Excel document.
> - You cannot import attachments from the standard Excel document to the guided sourcing event.
> - You cannot import event content to classic sourcing events by using the standard Excel document exported from guided sourcing events. However, you can import event content to guided sourcing events by using the standard Excel document exported from classic sourcing events.
> - You can view the pricing items by exporting the content using the **standard spreadsheet format** as explained in the following procedure.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon (•••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. In the event edit page, click the more icon (•••) and select **Import content from Spreadsheet**.

   The **Choose import method and upload file** popup appears.
3. In the **Choose import method and upload file** popup, do the following:

a. Select **SAP Ariba Standard format (items/questions/participants)** in the **What format is your Excel document?** section.

b. Select the **Content** checkbox to import event content or select **Participants** to import supplier data. You can select both the checkboxes to import event content and participants.

> ⓘ Note
>
> The **Participants** checkbox is available for selection only if the **Disable supplier invitation** rule is set to **No** in the guided sourcing template used for creating the event. For more information, refer to Disable supplier invitation.

c. In the **Do you want to add or replace event content?** section, do one of the following:

- Select **Add to event content** to add the event content from the standard Excel document to the existing event content.
- Select **Replace event content** to replace the existing event content with the new content from the standard Excel document.

4. In the drag and drop a standard format Excel sheet section, you can either drag or drop the Excel file or click **click to browse** and select the Excel document.
5. Click **Import**.

Results

The data from the Excel file is imported to the event.

If pricing conditions are enabled, the pricing data of line items is imported in the currency number format of the user's locale.

> Example
>
> A user belonging to the german locale creates a guided sourcing event with support for pricing conditions. The user prepares an Excel file to import line item data and adds a line item with a price value 10,2 (Ten Euros and 20 Cents).
>
> When the data is imported to the event, the price of the line item is set to 10.2.

Task overview: About Importing Event Content from Excel Files [page 310]

Related Information

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Smart Importing Line Items Linked to Material Master [page 314]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Improving Import Performance for Large Files with Formulas [page 324]

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.

Parent topic: About Importing Event Content from Excel Files [page 310]

Related Information

Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Smart Importing Line Items Linked to Material Master [page 314]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Importing Event Data from a Standard Excel Document [page 322]
Validate formulas only within a batch when importing event content from Excel [page 677]

Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects

Use this procedure to add event content to a guided sourcing event from the sourcing library (content library) or other guided sourcing 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)

You must also be a member of the **Category Buyer** group.

Context

Buyer users can choose to add content from the sourcing library or other guided sourcing projects (single events or full projects) to the guided sourcing event they are working on.

At the line item level, buyer users can add:

- Content that is stored in the sourcing library as content documents.
- Line items added in other guided sourcing projects (single events or full projects).

At the questions, requirements, and attachment level, buyer users can add

- Content that is stored in the sourcing library as questionnaires and attachments.
- Questions, requirements, or attachments added in other guided sourcing projects (single events or full projects).

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 676] parameter to **No** so that **Team Access Control** values for terms in the content library are not copied to projects.

Procedure

1. Create a guided sourcing event. To add content to an existing event, open the guided sourcing event for editing.

   For information about creating a guided sourcing event, see Guided Sourcing Project and Event Creation [page 76].
2. To add content to the event:

   - Select **Add** › **Items from finder** from the **Items that need quotes** section to add content related to line items.
   - Select **Add** › **Content from finder** from the **Questions, requirements, and attachments** section to add content related to questions, requirements or attachments.
   - Navigate to the upper-right corner of the page and select the more actions icon (•••), then select **Event settings** › **Add content from finder**.

   The **Add content from finder** page appears. The **Sourcing Library** tab which appears by default, shows the available content grouped under different tabs. Content related to line items is available as **Content Documents**, whereas content related to questions, requirements or attachments is available as **Questionnaires** and **Attachments** in the sourcing library.

Use the expand icon (>) as needed.

3. To add content from other guided sourcing projects, select the **Projects** tab on the **Add content from finder** page.

   The available content is shown grouped under different tabs.
   - To add content from a single event, select the **Single events** tab.
   - To add content from a full project, select the **Full projects** tab.
   - To view the content in the current project, select the **Current project** tab.
4. Select the content you want to add to your event.

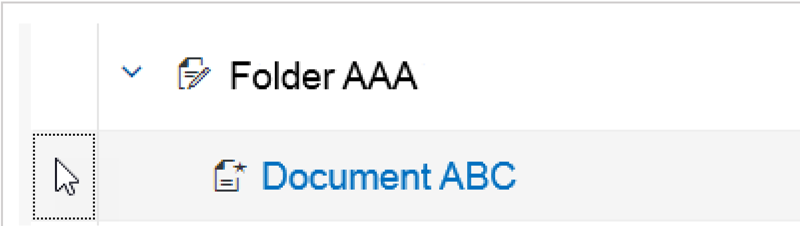
   You can apply filter criteria to streamline content on the page. The filters available on the page are:

Filter	Details
Title	Enter a value in the text field under the filter.
Document ID	Enter a value in the text field under the filter.
Commodities	Select a value from the drop down menu. You can also select from a list of related commodities grouped under a given commodity by clicking the > icon next to the commodity. You can select multiple values from the list.
Regions	Select a value from the drop down menu. You can also select from a list of related regions grouped under a given region by clicking the > icon next to the region. You can select multiple values from the list.
Departments	Select a value from the drop down menu. You can also select from a list of related departments grouped under a given department by clicking the > icon next to the department. You can select multiple values from the list.
Owner	Click the icon and choose from the list of owner names displayed in the resultant popup window. If the content owner's name is not present in the list, you can manually enter the name in the text field to search. You can only select one value from the list.

   You can also select toolbar icons to alter the table view.

To perform this action	Select this icon
Expand hierarchical entries, such as folders that contain documents.	↓≡
Collapse hierarchical entries.	↑⁻
Sort entries.	↓↑
Create one or more filtering statements that include or exclude entries based on column values.	
Choose columns to show or hide	

5. After finding the content to add to the event, select it by hovering to the left of the item and clicking the selection box that appears. For example:



After you select an item, the row for item is highlighted in blue.

Choose:

- **Add** to add the content and return to the event draft page.
- **Add and stay** to add the content and stay on the **Add content from finder** page.
- **Cancel** to return to the event draft page without adding any content.

Next Steps

Verify that the content is added to the event correctly.

Task overview: Importing Content for Guided Sourcing Events [page 310]

Related Information

About Importing Event Content from Excel Files [page 310]

Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events

Items that need quotes are items that you want to collect pricing information for.

Items that need quotes can be:

- **Line items** (including **material master items**)
- **Lots**

You can also organize items that need quotes using sections [page 333].

Line Items

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.

If your site is integrated with an external system, you can add line items from material master data [page 362].

Your site may be configured to support service items [page 367], which are line items to source services such as consulting or maintenance.

Lots

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.

In a guided sourcing event, the following lot types are available if they have been added to the event template:

Lot Type	Description
Item Lot: Bid at item level, compete at lot level (collect item pricing during bidding)	You add line items to an item lot. Suppliers submit responses (bids) for the individual items. You award all items in the lot to one supplier, or less commonly, you award a percentage of the lot to different suppliers. The perpcentage is applied to each line item and splits each line item among the awarded suppliers.
Basket: Bid at lot level, compete at lot level (collect item pricing post bidding)	You add line items to a basket lot. Suppliers can see the items but cannot enter prices for the items, only for the entire lot. When the bidding is finished, suppliers must provide the item prices in a process known as reconciliation for you to make awarding decisions. Suppliers who participate at the lot level when an event is in the **Open** state must also submit prices for line items within the lot when the event reaches the **Pending Selection** state. Only then the event can be awarded.
Basket with No Items: Bid at lot level, compete at lot level (do not collect item pricing)	You cannot add line items to this type of lots. Choose this type if you do not want to collect line item prices.

Comparing Line Items and Lots

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.

About the Items That Need Quotes Panel [page 330]

Adding Sections to Guided Sourcing Events [page 333]

Adding Lots to Guided Sourcing Events [page 335]

Adding Line Items in Guided Sourcing Events [page 337]

Editing Line Items in Guided Sourcing Events [page 343]

Creating Terms in Guided Sourcing Events [page 347]

Configuring Competitive Terms in Guided Sourcing Events [page 352]

Configuring Matrix Terms in Guided Sourcing Events [page 354]

Adding Formulas to Guided Sourcing Events [page 358]

Adding Lookup Formulas to Guided Sourcing Events [page 361]

Adding Material Master Items to Guided Sourcing Events [page 362]

Adding an Item from Article Master to a Guided Sourcing Event [page 365]

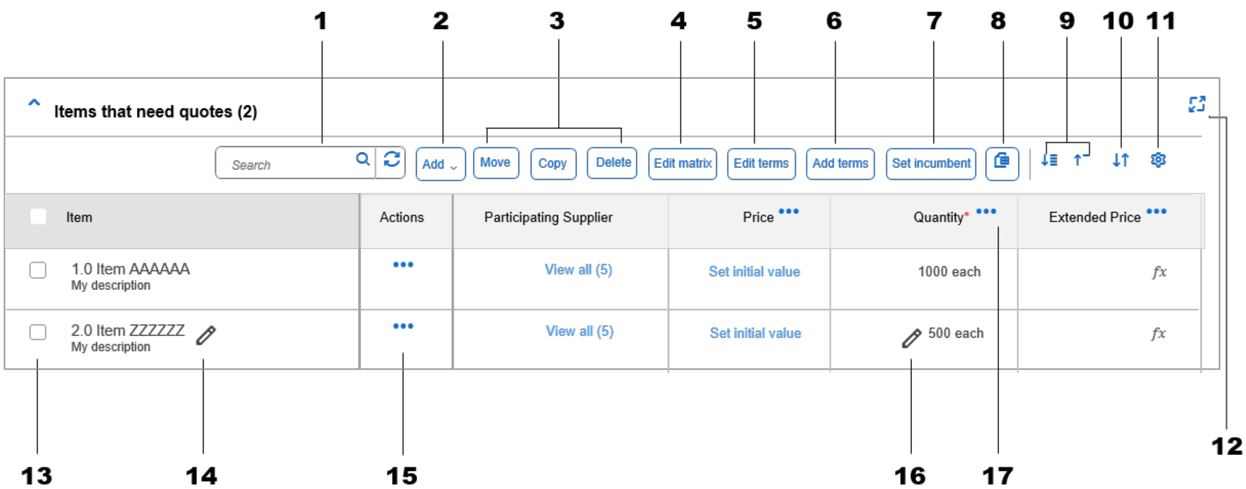
Service Items and Service Hierarchies in Guided Sourcing Events [page 367]

Adding an Ad Hoc Item to Article Master Data in Guided Sourcing [page 373]

Adding Product Questionnaires as Terms in Guided Sourcing Events [page 375]

About the Items That Need Quotes Panel

Use the **Items that need quotes** panel to view and edit line items, terms, lots, and sections in a guided sourcing event.



Users commonly perform the following actions from the **Items that need quotes** panel:

To Perform This Action...	Use This Element
Edit an item name or description	**14**. The edit icon ( ) appears when you hover over the item name or description.
Edit a term value	**16**. The edit icon ( ) appears when you hover over the term value.
Edit fields or terms for a single item	**15**. Click the more icon ( ) for an item, then select **Edit item**.
Edit multiple items (bulk edit items)	**13** and **3**. Check the selection boxes ( ) for the items you want to edit, which makes the **Move** and **Delete** buttons available. The **Add terms** and **Edit terms** buttons are available by default. You can use these buttons to directly add new item terms across line items and edit item terms across line items.
Move items	**13** and **3**. To move an item to any location in the list of items, check the selection box ( ) and the click **Move** button. You can search for another item to place the selected item before or after. If you have a lot or section, you can also move items inside the lot or section.

To Perform This Action...	Use This Element
Import event contents from an Excel document	**8**. You can import items from an Excel document [page 252] with a fixed format defined by SAP Ariba. Alternatively, you can use the smart import [page 311] feature to import event contents from an Excel document with your own format and have SAP Ariba map your entries to line items using machine intelligence.

The **Items that need quotes** panel includes the following elements:

1. Search box. Searches all fields and terms with a simple, exact-match search that ignores case.
2. **Add**: Add line items, lots, or sections.
3. Item-specific buttons, which are only available if you have selected items in the table.
   - **Move** and **Copy** button: Move or copy selected items.
   - **Delete** button. Delete selected items.
4. **Edit matrix**: Edit or add values for matrix terms. Available only when an event has matrix terms [page 354] defined.
5. **Edit terms**: Edit terms for all the selected items (bulk edit terms [page 330]). When bulk editing terms, you select the term you want to edit and set the value and rules for all selected items.
6. **Add terms**: Add terms to all the selected items.
7. **Set incumbent**: Set the incumbent suppliers for one or more items. If the incumbency status of suppliers at the line-item level and the event level are different, the status at the line-item level takes precedence over the status at the event level. This button is available only if you have selected items in the table.
8. Excel icon. Import items from Excel. You can import items from an Excel document with a fixed format defined by SAP Ariba or with your own format. See Importing Content for Guided Sourcing Events [page 310] for more information.
9. Icons to expand all or collapse all table entries.
10. Sort icon. You can sort entries by **Item** column (item name) text.
11. Settings icon. You can show or hide columns or change column order. See Showing, Hiding, Freezing, and Moving Table Columns [page 332] for more information.
12. Expand icon. Expands the table to the full page.
13. Checkbox to select an item.
14. Edit icon for an item name. Only visible when you hover next to the item name. If you hover next to the item description, an edit icon appears for the description.
15. More icon for an item. Opens a menu with options to edit the item, add terms to the item, add an item, use the messaging application to send a message about the item, or delete the item.
16. Edit icon for a term value. Only visible when you hover next to the term value.
17. More icon for the term.
   - If the competitive term isn't defined for items, you can set the competitive term by clicking the more icon (...) next to a term and choosing **Set as competitive term**.
   - You can copy an item term from a line item to all line items by clicking the more icon (...) next to a term and choosing **Apply term to all items**. The **Apply term to all items** option appears only if the item term is not added across all line items. When you select **Apply term to all items**, a confirmation popup appears and upon confirmation the term is applied to all line items.
   - You can edit an item term across all line items by clicking the more icon (...) next to a term and choosing **Edit term for all items**. When you select **Edit term for all items**, the **Mass edit** popup appears which displays the specific item term details to copy or edit.

The following buttons may also be available:

- **Set weight**: Set weights for item responses. This button is present only in events that are enabled for grading and scoring (the **Enable scoring on participant responses** event rule is enabled) and that contain items with responses that can be graded.
- **Add to offline bid**: Configure items to receive bid responses from custom offline response sheets. This button is available for selection when you select the checkbox corresponding to the item and lots (basket without items and item lot).

Showing, Hiding, Freezing, and Moving Table Columns

- **Showing and Hiding columns**
  To show or hide columns in a table, select the settings icon ( ) in the upper-right corner of the table. Use the popup to choose columns to show or hide
- **Freezing Column Positions**
  Freezing a column locks its position when you scroll horizontally; it also locks the position of all columns to the left of the frozen column. Frozen columns cannot be resized
  To freeze a column, click the more options icon (•••) in the column header and select **Freeze**. If a column header doesn't have a more options icon, click the column header and select **Freeze**
  Note that you can only freeze columns shown in the initial table view. To freeze columns that require horizontal scrolling to view, expand your window or reorganize your table columns.
- **Moving Column Positions**
  To move a column to the left or right:
  1. Unfreeze any frozen table columns by clicking the more options icon (•••) in the column header (or the column header, if there's no more icon) and selecting **Unfreeze**.
  2. Select the settings icon ( ) in the upper-right corner of the table to open a popup with column names.
  3. Deselect all columns, then select a single column to move.
  4. Use arrows (,) to move the column up (to the left) or down (to the right). Use double arrows (,) to move the column to the top (leftmost position) or the bottom (rightmost position).
  5. Reselect the columns you want to show.

  In the **Items that need quotes** table, column order changes are persistent and retained when you reopen the table. Changing the column order also changes the order of terms shown to event participants and the order of terms shown when editing items.

Parent topic: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]
Configuring Competitive Terms in Guided Sourcing Events [page 352]

Adding Sections to Guided Sourcing Events

This procedure demonstrates how to use sections to organize content in events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

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

You can configure a numeric term, such as **Price**, to be added up (rolled up) from the line items in the section and displayed for the section.

In addition to the procedure described below, you can add sections from Excel documents, the sourcing (content) library, or other events. See About Importing Event Content from Excel Files [page 310] and Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324] for more information.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.

2. Go to the **Items that need quotes** or **Questions, requirements, and attachments** panel and click **Add** › **Section**.
3. Enter a name and description for the section.

   By default, the section and its contents are visible to suppliers (participants). To change the visibility of the section and its contents, click **See all options** and select an option in the dropdown for the **Can participants see this section?** field. For example, you can hide the section and its contents until a supplier has answered prerequisite questions.
4. **Optional:** If the envelope bidding feature is enabled, specify an envelope ID in the **Envelope** field to assign the section to an envelope.

   For details about how to build envelopes, refer to Building Envelopes in Guided Sourcing Events [page 425].

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
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Adding a Category Attribute Hierarchy Item to a Guided Sourcing Event [page 379]
Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event [page 382]
Linking Items to a Basket Lot in Guided Sourcing [page 385]
Adding Questions and Prerequisites to Guided Sourcing Events [page 391]
About Envelope Bidding in Guided Sourcing Events [page 415]

Adding Lots to Guided Sourcing Events

Use this procedure to add lots to guided sourcing events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

In a guided sourcing event, the following lot types are available if they have been added to the event template:

Lot Type	Description
Item Lot: Bid at item level, compete at lot level (collect item pricing during bidding)	You add line items to an item lot. Suppliers submit responses (bids) for the individual items. You award all items in the lot to one supplier, or less commonly, you award a percentage of the lot to different suppliers. The perpcentage is applied to each line item and splits each line item among the awarded suppliers.
Basket: Bid at lot level, compete at lot level (collect item pricing post bidding)	You add line items to a basket lot. Suppliers can see the items but cannot enter prices for the items, only for the entire lot. When the bidding is finished, suppliers must provide the item prices in a process known as reconciliation for you to make awarding decisions. Suppliers who participate at the lot level when an event is in the **Open** state must also submit prices for line items within the lot when the event reaches the **Pending Selection** state. Only then the event can be awarded.
Basket with No Items: Bid at lot level, compete at lot level (do not collect item pricing)	You cannot add line items to this type of lots. Choose this type if you do not want to collect line item prices.

In addition to the procedure described below, you can add lots from Excel documents, the sourcing (content) library, or other events. See About Importing Event Content from Excel Files [page 310] and Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324] for more information.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel and click **Add** > **Lot**.

   The **Add lot** popup opens for you to add an item lot. To add a basket lot, you also need to click **See all options** and then select this basket lot type in the **Lot Type** field.

3. Enter a name and description for the lot.
4. Enter values for terms as needed.

   Only terms defined for lots in the template used to create the event are shown.

   The preconfigured template provided by SAP Ariba defines only the **Extended Price** term for lots. This term is calculated by rolling up (adding up) the value for **Extended Price** from the line items in the lot, so you don't need to specify a value for it.
5. Select an option for **Response required for this item or lot**.

   The default value of this option is set to **No**, which implies that participants can choose to not submit a response for this item but will still be allowed to submit responses for other items in the event. If you choose **Yes**, participants won't be able to submit responses for any items in the event unless they include a response for this item.

   > ⓘ Note
   >
   > This option is also available on the lot details page that appears when you select **See all options** to specify additional information. Based on your choice, you can choose to make a selection in this step or on the lot details page.
6. **Optional:** To specify additional information, options, or terms:
   - For an item lot, click **See all options** to go to the lot details page.
   - For a basket lot, you do not need to click **See all options** as you are already on the lot details page.

   If you do not want to specify additional information, options, or terms, click **Add** and skip the remaining steps.
7. **Optional:** Select values for the **Commodity** and **Region** fields.

   Selecting values for the **Commodity** and **Region** fields is optional, but if you site uses SAP Ariba Supplier Lifecycle and Performance, suppliers may be designated with a qualification status and preference level for a commodity and region combination. Specifying commodities and regions for items can be used to filter or restrict suppliers based on their qualification status for the commodity and region.

   The **Commodity** and **Region** field values might also be used by your organization to analyze spending or saving information.
8. Select an option for **Can participants see this item?**

   Options:
   - **Yes** (the default): The item is always visible to participants.
   - **Yes, only after participants answer the prerequisite questions**: Participants only see the item after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391].
9. Select an option for **Response required for this item or lot**

   Options:
   - **No** (the default): Participants can choose to not submit a response for this item but will still be allowed to submit responses for other items in the event.
   - **Yes**: Participants won't be able to submit responses for any items in the event unless they include a response for this item.
10. Select a term to be the **Competitive term**.

    You can only select a **Competitive term** if the choice for this field is delegated to the event owner in the template used to create this event.

SAP Ariba uses the value of the competitive term to rank responses. Only terms configured as possible competitive terms (based on the value for the field **Choose how to rank bids if this will be a competitive term** in the term settings) are shown in the dropdown.

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Line Items in Guided Sourcing Events [page 337]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]
Configuring Competitive Terms in Guided Sourcing Events [page 352]
Configuring Matrix Terms in Guided Sourcing Events [page 354]
Adding Formulas to Guided Sourcing Events [page 358]
Adding Lookup Formulas to Guided Sourcing Events [page 361]
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Adding an Item from Article Master to a Guided Sourcing Event [page 365]
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Viewing, Editing, or Removing a Product Questionnaire Line Item Term in a Guided Sourcing Event [page 378]
Adding a Category Attribute Hierarchy Item to a Guided Sourcing Event [page 379]
Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event [page 382]
Linking Items to a Basket Lot in Guided Sourcing [page 385]

Adding Line Items in Guided Sourcing Events

Use this procedure to add line items to guided sourcing events. A **line item** is the smallest entity for which a participant can submit prices for or bid on.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

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.

For more information about line items, see Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328].

In addition to the procedure described below, you can add sections from Excel documents, the sourcing (content) library, or other events. See About Importing Event Content from Excel Files [page 310] and Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324] for more information.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel and click **Add** > **Line item**.

   The **Add line item** popup opens.
3. Enter a name and description for the line item.
4. **Optional:** If you have enabled the envelope bidding feature, select an envelope number in the **Envelope** field to enclose the item in that envelope.
5. Enter values for terms as needed.

   If you have enabled the envelope support for item terms feature, select an envelope number in the **Envelope** column to enclose the term in that envelope.

   Only terms defined for line items in the template used to create the event are shown. In addition, terms must either require owner input (**Response required** is **Yes, Owner required**) or be one of the following terms to be shown:
   - **Quantity**
   - **Price**
   - **Extended Price** (**Quantity** times **Price**)
   - **Total Cost**

   To see all terms defined for the item, click **See all options**.

   > ⓘ Note
   >
   > You can drag and drop an attachment from the **Messages** popup into a line item term. Open the **Messages** popup and open the term for editing (click the select the more options icon (•••) next to the term name, then select **Edit term**. Drag an attachment from a message and drop it in the **References** drop box for the term.
   >
   > You can add only one attachment of a maximum size of 100 MB to a line-item term. If you try to add a new attachment to a term that contains an attachment, an error occurs and the attachment fails.

> For more information, see About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568].

6. Select an option for **Response required for this item or lot**.

   The default value of this option is set to **No**, which implies that participants can choose to not submit a response for this item but will still be allowed to submit responses for other items in the event. If you set the value to **Yes**, participants won't be able to submit responses for any items in the event unless they include a response for this item.

   > ⓘ Note
   >
   > This option is also available on the item details page that appears when you select **See all options**You can drag and drop attachments from message popups into line item to specify additional information. Based on your choice, you can choose to make a selection in this step or on the item details page.

7. The **Show item as read-only** field allows you to prevent suppliers from changing prices they have already submitted for an item. This field is only editable when all supplier responses are received for the line item.
8. **Optional:** Select one of the following options for the **Team Access Control** to set access control for various content elements. If you do not set any access control for content elements, they can be viewed by anyone who has access to the guided sourcing event. Event owners can see all content elements.

   Options:

   - **Legal Information**
   - **Owner/Administrator Only**
   - **Private to Team Members**
   - **Classified**
   - **Finance Information**
9. **Optional:** To specify additional information, options, or terms for the line item, such as requiring participants to submit a response for this line item, click **See all options**.

   If you do not want to specify additional information, options, or terms, click **Add** and skip the remaining steps.
10. Select values for the **Commodity** and **Region** fields.

    Selecting values for the **Commodity** and **Region** fields is optional, but if you site uses SAP Ariba Supplier Lifecycle and Performance, suppliers may be designated with a qualification status and preference level for a commodity and region combination. Specifying commodities and regions for items can be used to filter or restrict suppliers based on their qualification status for the commodity and region.

    The **Commodity** and **Region** field values might also be used by your organization to analyze spending or saving information.
11. Select an option for **Can participants see this item?**

    Options:

    - **Yes** (the default): The item is always visible to participants.
    - **Yes, only after participants answer the prerequisite questions**: Participants only see the item after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391].
12. Select an option for **Response required for this item or lot**

    Options:

- **No** (the default): Participants can choose to not submit a response for this item but will still be allowed to submit responses for other items in the event.
- **Yes**: Participants won't be able to submit responses for any items in the event unless they include a response for this item.

13. **Optional:** If pricing conditions are enabled at the template level, you can define pricing conditions for the line item. For more information about pricing conditions, see About Using Pricing Conditions in Guided Sourcing Events [page 341].
14. Select a term to be the **Competitive term**.

    You can only select a **Competitive term** if the choice for this field is delegated to the event owner in the template used to create this event.

    SAP Ariba uses the value of the competitive term to rank responses. Only terms configured as possible competitive terms (based on the value for the field **Choose how to rank bids if this will be a competitive term** in the term settings) are shown in the dropdown.
15. **Optional:** Add terms or formulas for the item.

    In most cases, you don't need to create a new term and can use a term or formula that is already defined. SAP Ariba preloads a set of commonly used sourcing terms and formulas, or **System Global** terms, for all customers. In addition, your site may have **Global** terms and formulas that are published in an event template, which can be added to any event.

    To add an existing term or formula to the item, click **Add term** and select the term or formula from the **Add terms** page.

    To create a new term, click **Add term**, then click **Create new term** on the **Add terms** page. See Creating Terms in Guided Sourcing Events [page 347] and Event Terms for additional information.

    To create a new formula, click **Add formula**. See Adding Formulas to Guided Sourcing Events [page 358] for additional information.
16. If you want to exclude participants (suppliers) for the event from submitting responses for this item, go to the **Invite participants** table. Select the participants you want to exclude and click **Remove participants**.
    Pagination is enabled for participating suppliers and supplier records are listed in batches of 50.

    If you removed participants for an item, you can add them back from the **Additional event participants** table.

    You can use the toolbar in the **Additional event participants** table to sort and filter suppliers:

To perform this action	Select this icon
Sort entries.	↓↑
Create one or more filtering statements that include or exclude entries based on column values.	⛛ When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Choose columns to show or hide.	⚙

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]
Configuring Competitive Terms in Guided Sourcing Events [page 352]
Configuring Matrix Terms in Guided Sourcing Events [page 354]
Adding Formulas to Guided Sourcing Events [page 358]
Adding Lookup Formulas to Guided Sourcing Events [page 361]
Adding Material Master Items to Guided Sourcing Events [page 362]
Adding an Item from Article Master to a Guided Sourcing Event [page 365]
Service Items and Service Hierarchies in Guided Sourcing Events [page 367]
Adding an Ad Hoc Item to Article Master Data in Guided Sourcing [page 373]
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Viewing, Editing, or Removing a Product Questionnaire Line Item Term in a Guided Sourcing Event [page 378]
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Linking Items to a Basket Lot in Guided Sourcing [page 385]
Adding Material Master Items to Guided Sourcing Events [page 362]
Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317]
Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Dragging and Dropping Attachments into a Guided Sourcing Event [page 569]
About Envelope Bidding in Guided Sourcing Events [page 415]

About Using Pricing Conditions in Guided Sourcing Events

If your site has SAP Ariba Strategic Sourcing Suite enabled, you can apply pricing conditions at the line-item level in guided sourcing events. You can view and edit the pricing condition settings of a line item in the guided sourcing events.

> ⚠ Restriction
>
> 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.

To use pricing conditions for line items in guided sourcing events created through SAP Ariba Strategic Sourcing Suite:

- Your site must be enabled to use the guided sourcing functionality. For more information, see Setting up guided sourcing.
- You must be a member of the **Category Buyer** group to create and run guided sourcing events. For more information about creating guided sourcing events, see Managing events with guided sourcing.
- To use pricing conditions for line items in guided sourcing events, do one of the following:
  - Use an RFP event template which is preconfigured with pricing conditions for the guided sourcing event. For an RFP template to be available in guided sourcing, you must set the **Guided Sourcing Template** template property to **Yes**. For more information, see How to configure event templates for guided sourcing in Setting Up Guided Sourcing.
  - Enable the **Allow Pricing Conditions** rule for the guided sourcing event. Click the more icon ( ) in the upper-right corner of the event page and select **Event settings** > **Set event rules** . Navigate to the **Bidding rules** section to enable **Allow Pricing Conditions**. Enter the default pricing condition settings for line items in the **Bidding rules** section. For more information, see Guided sourcing event rules in Setting Up Guided Sourcing.

The guided sourcing event displays line items and the associated item terms in the form of a table in the **Items that need quotes** panel. When pricing conditions are enabled for line items, the **Items that need quotes** panel displays the **Edit pricing conditions** button for the line items table.

When pricing conditions are enabled for item terms, a clickable link, **Pricing Condition**, appears for the item terms in the line items table of the **Items that need quotes** panel. A **Quick View** icon ( ) is also displayed below the **Pricing Condition** link for the item terms. The **Quick View** icon ( ) displays the pricing conditions for the item term in a popup and the details are read-only.

You can view and edit pricing conditions of a line item in a guided sourcing event by using one of the following options:

- Select a line item and click the **Edit pricing conditions** button.
- Select multiple line items and click the **Edit pricing conditions** button to bulk edit pricing conditions for the selected line items.
- Select the **Pricing Condition** link that appears for item terms in the line items table. When you select the **Pricing Condition** link, the **Pricing conditions** page appears. You can also edit the pricing conditions of a line item by using the **Edit pricing conditions** button available in the **Pricing conditions** page.

> **Note**
>
> You can edit the pricing conditions for line items by using the **Edit pricing conditions** button in the **Pricing conditions** page only if the guided sourcing event is in the draft status. If the guided sourcing event is in the completed status, you can only view the pricing conditions information of a line item in the **Pricing conditions** page.

The **Pricing conditions** page displays the following UI options:

UI Options	Description
Item dropdown	Use the dropdown to select a line item. Upon selection, the line item details such as ID, Plant, Total quantity, and Date Range are displayed. Also, the pricing conditions for a selected line item are displayed in the form of a table.

UI Options	Description
Edit pricing conditions button	Click the button to edit the pricing conditions settings for the selected line item. You can use this button to edit the pricing condition settings only when the guided sourcing event is in the draft status. Note If the guided sourcing event is in the completed status, the **Pricing Conditions** page displays a View Pricing Condition Settings button instead of the Edit pricing conditions button.
Select validity period dropdown	Select a validity period range to display the associated pricing condition details.
Pricing conditions table	Displays the pricing conditions information in the form of a table. You can edit the table to add pricing information.

> Note
>
> You can only edit the pricing conditions in the **Pricing conditions** page if the guided sourcing event is in the draft status.

Disabling Pricing Conditions in Guided Sourcing Events

Pricing conditions can be disabled for line items and item terms in the editing page of the guided sourcing event.

- To disable pricing conditions for line items, select the line item and click **Edit pricing conditions** button. In the **Edit pricing condition settings** popup, disable **Allow Pricing Conditions**.
- To disable pricing conditions for an item term, select the line item and click **Edit terms**. Select the respective item term in the **Term attributes** tab and disable **Enable pricing conditions**.

Editing Line Items in Guided Sourcing Events

Use this procedure to edit line items in guided sourcing events. A **line item** is the smallest entity for which a participant can submit prices for or bid on.

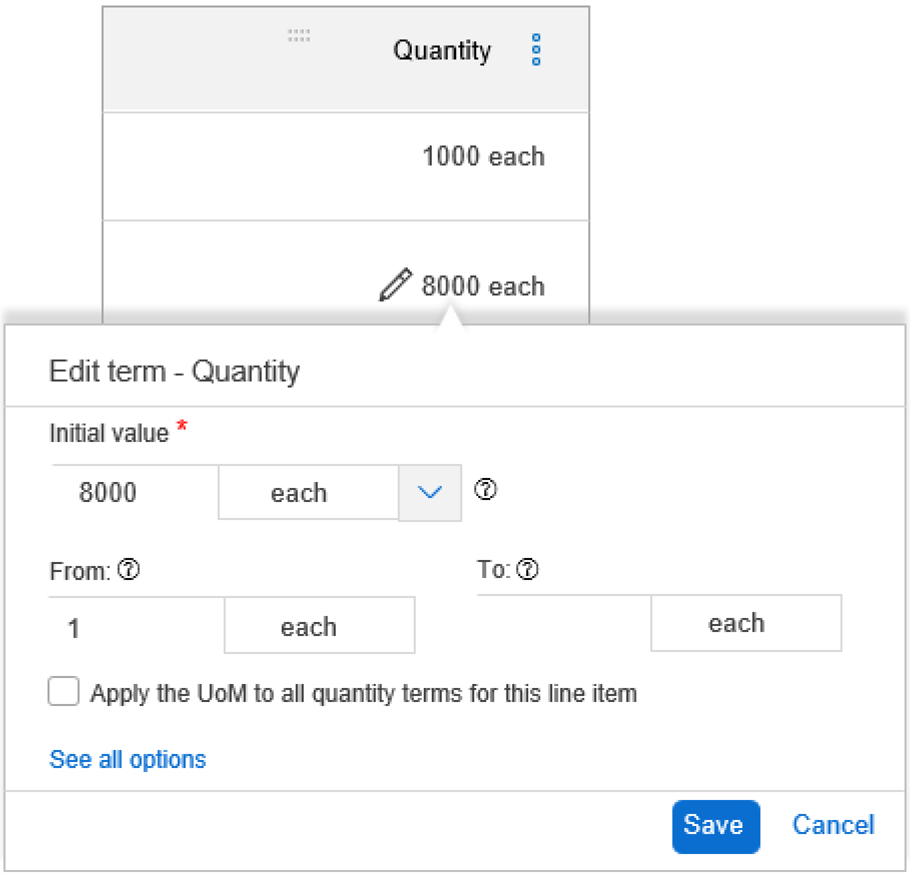
Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel.
3. To edit an item field or term in a single item, click the field or term value. Fields or terms you can edit show an edit icon ( ) or a clickable link to set the initial value.

   A popup opens with the initial value and valid values:

   If you're editing a term that specifies a quantity, you can also change the Unit of Measure (UoM) by clicking the dropdown next to the UoM. You can also apply the UoM change to all quantity terms for the same line item.

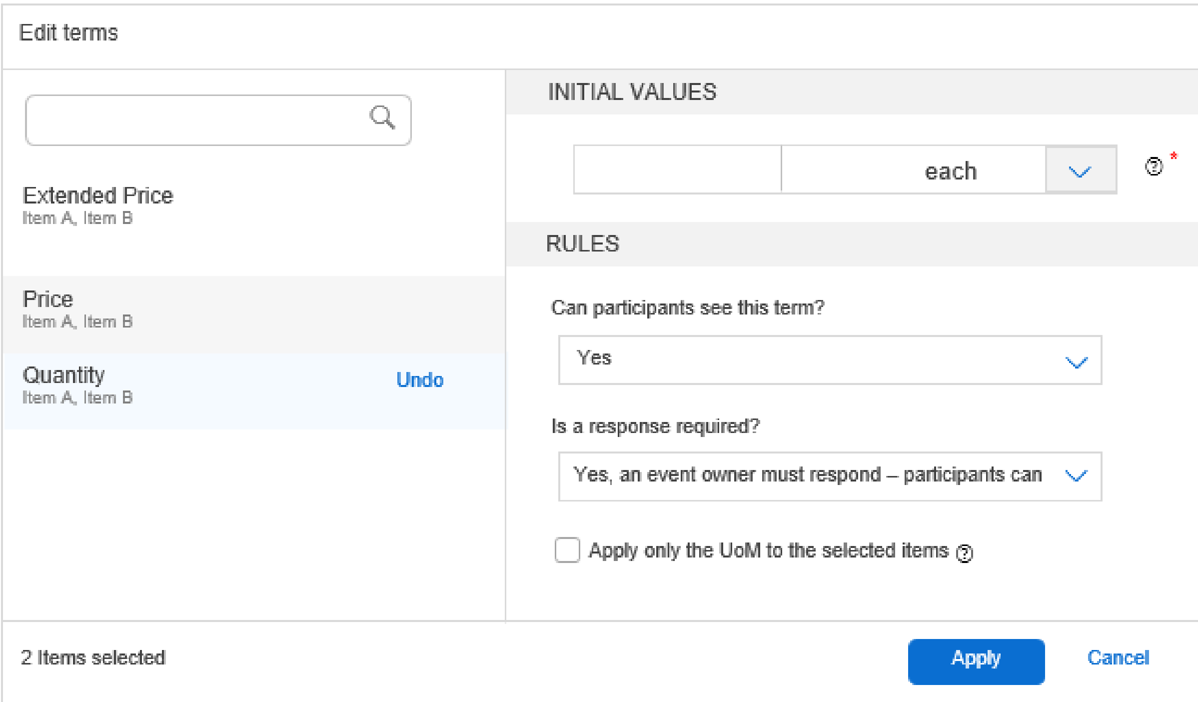
   Click **See all options** to set additional options and participant-specific initial values as described in Adding Line Items in Guided Sourcing Events [page 337] and Creating Terms in Guided Sourcing Events [page 347].

   > Note
   >
   > You can drag and drop attachments from message popups into line item terms. Click **Set initial value** and drag and drop the file you want to add as attachment into the **References** section of the **Set initial value**.
   >
   > You can add only one attachment of a maximum size of 100 MB to a line-item term. If you try to add a new attachment to a term that contains an attachment, an error occurs and the attachment fails.
   >
   > For more information, see About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568].

4. To edit or add terms to multiple items (bulk edit items), click the selection boxes for the line items you want to edit, then click **Add terms** or **Edit terms**.

   If you click **Add terms**, you can select a term that's already defined for your site or create a new term [page 337].

   If you click **Edit terms**, a popup opens with the existing terms for the line items you selected:

   On the left side of the popup, choose the term you want to edit. On the right side of the popup, set the value and rules for the term in all selected items. If the data type for the term is **Quantity**, you can also choose a different Unit of Measure (UoM) and apply only the changed UoM to all selected items and retain the other quantity and rule values.

5. To designate suppliers as incumbents at the line-item level, you can either bulk edit the line items or edit individual line items.

   - To bulk edit, choose multiple items and click **Set Incumbent**. In the **Select suppliers to mark incumbent** popup, turn on the toggle for the suppliers that you want to mark as incumbents, and then click **Save**. Only limited number of suppliers records are displayed at a time in the **Select suppliers to mark incumbent** popup. The remaining suppliers are loaded as you scroll through the popup.
   - To designate incumbent suppliers for an individual item, edit the item and turn on the toggle for the suppliers in the **Is this an incumbent supplier?** column in the **Item participants** section. Click **Save**. Pagination is enabled for participating suppliers and supplier records are listed in batches of 50. You can also dynamically search for the suppliers and contacts by their names, email addresses, or phone numbers.

6. If you want to exclude participants (suppliers) for the event from submitting responses for this item, go to the **Invite participants** table. Select the participants you want to exclude and click **Remove participants**.

   Pagination is enabled for participating suppliers and supplier records are listed in batches of 50.

   If you removed participants for an item, you can add them back from the **Additional event participants** table.

You can use the toolbar in the **Additional event participants** table to sort and filter suppliers:

To perform this action	Select this icon
Sort entries.	↓↑
Create one or more filtering statements that include or exclude entries based on column values.	∇ When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Choose columns to show or hide.	⚙

7. If all of the items you selected have received initial bids from all suppliers invited to bid on the items, you can use the **Show item as read-only** field on the General attributes tab to mark several line items in an event as read-only for suppliers in a single action. This allows you to prevent suppliers from changing prices they have already submitted for the selected items. **Keep Values** is the default selection for this field. This allows you to mass edit other fields while leaving the values for the **Show item as read-only** field unchanged in the selected line items.
   If an event contains items for which **Show item as read-only** is set to **Yes**, when you select **Update** for the event, you will not have the option to discard supplier bids.
   Note: If a basket lot with linked items (also known as a prepack) contains items for which **Show item as read-only** is set to **Yes**, the price quoted for those items cannot be changed by suppliers.

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
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Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event [page 382]

[Linking Items to a Basket Lot in Guided Sourcing [page 385]]
[Adding Line Items in Guided Sourcing Events [page 337]]
[Adding Formulas to Guided Sourcing Events [page 358]]
[Configuring Competitive Terms in Guided Sourcing Events [page 352]]
[Creating Terms in Guided Sourcing Events [page 347]]
[Dragging and Dropping Attachments into a Guided Sourcing Event [page 569]]
[Designating Suppliers as Incumbents in Guided Sourcing Events [page 291]]
[Synchronize unit of measure for item]

Creating Terms in Guided Sourcing Events

Use this procedure to create terms in guided sourcing events. Use terms to collect information about items from suppliers (participants), such as **Price**, and to provide information to suppliers, such as **Quantity**.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

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.

You can define terms that collect a single value or multiple values. You can collect responses in many formats, including text, numbers (integers), decimal numbers, percentage, quantity, money values, Boolean values, dates, and addresses. Text can be **Short answer** (a single line, up to 255 characters) or **Long answer** (multiple lines of text, up to 100,000 characters).

When you define a term, you can also specify a range of the acceptable values or specific values that suppliers can select.

You can also define terms using formulas calculated using other terms. For example, SAP Ariba provides the preconfigured term **Extended Price**, which is defined as **Price** times **Quantity** (`Price * Quantity`).

> ⓘ Note
>
> If you have configured your guided sourcing event to use bidding currency, then the bidding currency is displayed as an item term in the item table. You can choose to add, remove, or edit bidding currency in the items table.

In most cases, you don't need to create a new term and can use a term or formula that is already defined. SAP Ariba preloads a set of commonly used sourcing terms and formulas, or **System Global** terms, for all customers. In addition, your site may have **Global** terms and formulas that are published in an event template, which can be added to any event.

For additional information about term types, values, and options, see Event Terms and Common Event Content Fields.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** › **Edit event**.
2. Use one of the following methods to open the **Add terms** page:
   - To create a term and add it to all items, click the **Add terms** button at the top of the item table.
   - To create a term and add it to specific items, check the selection box for the items. Click the **Add terms** button at the top of the item table.
   - To create a term and add it to a single item, click the more icon (•••) for the item and select **Add terms**.
3. On the **Add terms** page, click **Create new term**.
4. Specify the format (data type) for the answer.
   The default is **Short answer**, a single line of text.
5. Depending on the answer type, enter specifications for acceptable answers.

   Numeric answer types (**Money**, **Number**, **Decimal**, **Quantity**, **Percentage**, and **Date**) allow you to specify a range for an acceptable value. The answer types **Text**, **Money**, **Number**, **Decimal**, **Percentage**, and **Date** allow you to create a dropdown with values for suppliers to choose from.

   To create a dropdown with choices for suppliers:
   a. Select the number of responses the supplier can choose: **Single choice** or **Multiple choices**.
   b. In the box below **Single choice** or **Multiple choices**, enter the first choice for the dropdown. Click the plus sign (⊕) to add more boxes and enter additional choices for the dropdown.
   c. To configure a default value for a **Single choice** term, hover over the left column, then click the selection box that appears. For a **Multiple choices** term, select a radio button next to one or more of the values.

      In the following example, the user is selecting 90 as the default value:

6. **Optional:** Specify an initial value for the term.

   If you invited suppliers (participants) to the event, you can also specify different initial values for each supplier (participant-specific initial values):

   a. Slide the toggle for **Set participant-specific initial values** to **On**.

      A table with the suppliers you have invited to the event opens at the bottom of the page.

   b. Enter participant-specific initial values in the rows to the right of the contact names.

   When you view the **Items that need quotes** table, terms with participant-specific values are indicated by the following icon:

   > ⓘ Note
   >
   > When the **Enable Initial and historical value display by default in guided sourcing events** (`Application.ACM.DisplayInitialAndHistoricValueByDefault`) parameter is enabled, the initial and historical values are displayed by default in the **Items that need quotes** panel in guided sourcing events. For more information see, Enable Initial and historical value display by default in guided sourcing events.

7. **Optional:** If you have enabled the envelope support for item terms feature, select an envelope in the **Envelope** column to enclose the term in that envelope.
8. **Optional:** To add a reference document specific to this term, use the **References** file upload area (**Drag file here or browse to upload**) to drag and drop or select a file.

   A link that that enables suppliers to download the reference document will be shown only for line items that include this term.

   You can also add attachments for the entire event in the **Questions, requirements, and attachments** panel.
9. Select an option for **Is a response required?**

   Options:
   - **No**
   - **Yes, participants must respond** (the default): Participants (suppliers) must include a response for this term to submit their bids (responses) for the event.
   - **Yes, an event owner must respond - participants cannot respond**: Select this option for terms you require an event owner to specify, either because participants need the information to submit responses (for example, this option is set for the term **Quantity**), or for terms you use for internal analysis or reporting.
10. Select an option for **Can participants see this term?**

    Options:
    - **No** (only available when **Is a response required?** is **No** or **Yes, an event owner must respond - participants cannot respond**): The term is never visible to participants (suppliers). Use this option to hide content that you regard as confidential or sensitive from potential participants.
    - **Yes** (the default): The term is always visible to participants.
    - **Yes, only after participants answer the prerequisite questions**: Participants (suppliers) only see the term after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391]. The prerequisite can also be configured so that an event owner must approve a response to satisfy the prerequisite.

11. **Optional:** Select one of the following options for the **Team Access Control** to set access control for various content elements. If you do not set any access control for content elements, they can be viewed by anyone who has access to the guided sourcing event. Event owners can see all content elements.

    Options:

    - **Legal Information**
    - **Owner/Administrator Only**
    - **Private to Team Members**
    - **Classified**
    - **Finance Information**

12. Select an option for **Participant can add additional comments and attachments**

    Options:

    - **No** (the default): Participants cannot add comments and attachments when they respond to the term.
    - **Yes**: Participants can add comments and attachments using the comment ( ) icon when they respond to the term. The ability to add comments and attachments gives suppliers the opportunity to include additional information with their response. For example, if a term requires an answer that must be a number, suppliers may have additional information that helps explain or expands on their answer. Suppliers can also choose to upload an attachment as part of their comment.
      When suppliers include a comment with their response, a comment ( ) icon appears next to the supplier response in the **Items that need quotes** section. Click the comment ( ) icon to view supplier comments and download attachments.

    > Note
    >
    > The **Participant can add additional comments and attachments** option is displayed only when the following options are selected for **Is a response required?**:
    >
    > - **Yes, participants must respond**
    > - **No**
    > - **Yes, an event owner must respond - participants can optionally respond**

13. If this is a numeric term, select an option for **Does the term have a 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.

    Options:

    - **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.

14. If this is a numeric term, select an option for **Roll up the value to the section summary**

    Options:

    - **No** (the default)
    - **Yes**: If line items with this term are organized in a section, add up (roll up) this term's value for all line items in a section and display the value.

15. If this is a numeric term, select an option for **Choose how to rank bids if this will be a competitive term**.

    You can designate a term as the **competitive term** for an item and have SAP Ariba Sourcing rank responses based on that term. For example, you can configure **Price** or **Extended Price** as the competitive term for an item. Any numeric term (**Money**, **Number**, **Decimal**, **Quantity**, **Percentage**) or term calculated from a formula can be a competitive term.

    If you want this term to be the competitive term, first select a value for **Choose how to rank bids if this will be a competitive term** to make this term a possible competitive term.

    Options:
    - **This will not be a competitive term**
    - **Lower is better**: This will be a competitive term and the lowest value is the best value.
    - **Higher is better** This will be a competitive term and the highest value is the best value.

    After you configure a term as a competitive term, you can select it as the competitive term for some or all items in your event, as described in Configuring Competitive Terms in Guided Sourcing Events [page 352].

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Configuring Competitive Terms in Guided Sourcing Events

With competive RFPs and auctions, you can use this procedure to designate a term as the **competitive term** for an item and have SAP Ariba Sourcing rank responses based on that term.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

If you designate a term as the **competitive term** for an item, SAP Ariba Sourcing ranks responses based on that term. For example, you can configure **Price** or **Extended Price** as the competitive term for an item. Any numeric term (**Money**, **Number**, **Decimal**, **Quantity**, **Percentage**) or term calculated from a formula can be a competitive term.

In most cases:

- Your site is already configured with terms that can be competitive terms.
- The competitive term for items in the **Items that need quotes** table is configured for you in the event template. The competitive term is typically the **Extended Price** term (**Price** times **Quantity**) or the **Total Cost** term (calculated from a user-defined formula).

Use the following procedure if the competitive term isn't defined for items in your event and you want to configure competitive terms.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. If you want to configure the same term as the competitive term for all items in the event:
    a. Go to the **Items that need quotes** table and click the column view icon ( ) in the upper-right corner of the table
    b. Click the more icon ( ) next to the appropriate term and choose **Set as competitive term**.

c. Choose **Lower is better** or **Higher is better**.

3. To configure the competitive term for a single item or a subset of the items in your event:
   a. Configure the term you want to use as the competitive term as a possible competitive term. In the **Items that need quotes** table, open the **Edit term** page for the term. Go to the field **Choose how to rank bids if this will be a competitive term** and choose **Lower is better** or **Higher is better**.
   b. Click the more icon (•••) to the right of the item names you want to configure and select **Edit item**
   c. Go to the **Information & rules** area and select the term from the **Competitive term** dropdown. Only terms configured as a possible competitive term are shown.

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Configuring Matrix Terms in Guided Sourcing Events

Use matrix terms to create copies of entries in an item table for items or lots, where each copy has a different value for the matrix term.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

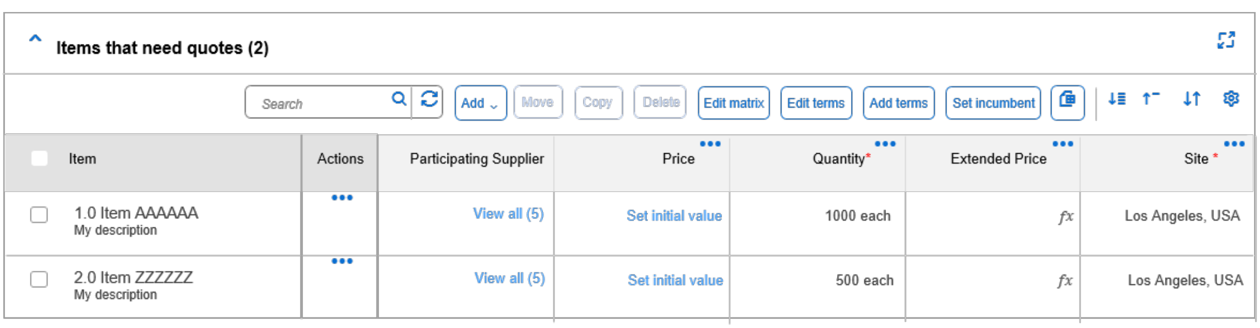
Context

You use matrix terms to create copies of entries in an item table for items or lots, where each copy has a different value for the matrix term.

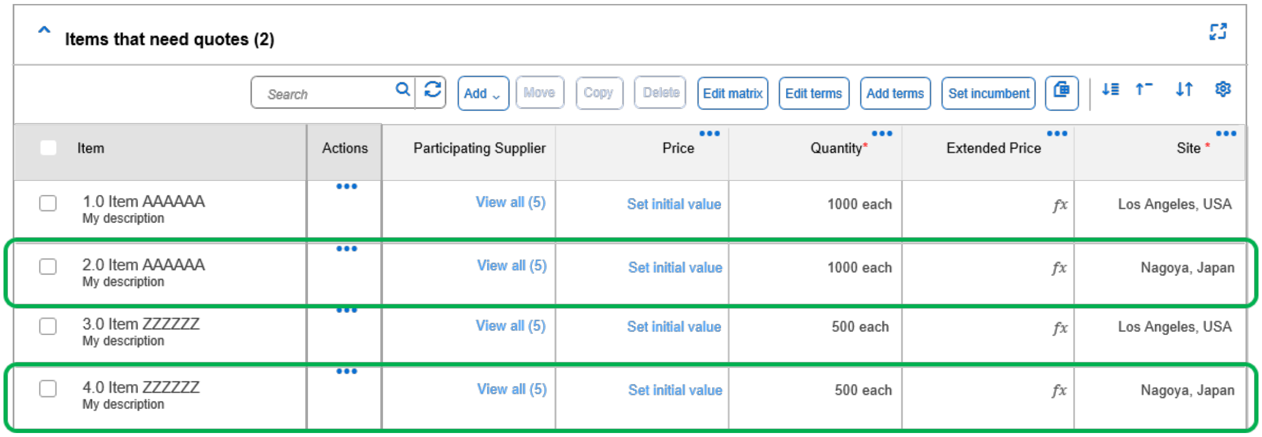
For example, you need a material and want to collect different pricing information for the material based on the site that it's shipped to. Rather than manually creating a line item for the material for each site, you can create one item for the material and add a **Site** term as a matrix term. You configure values for the **Site** term and specify which items to apply the values to. SAP Ariba creates a new entry in the items table for each combination of item and matrix term value applied to the item.

In following example, an event owner is collecting pricing information for 2 materials (items). The item table initially contains:

- 2 line items (**Item AAAAAA** and **Item ZZZZZZ**).
- Each item includes the matrix term **Site**. The **Site** term has only the initial value **Los Angeles, USA**.



The event owner uses the **Edit matrix** page to add a second value (**Nagoya, Japan**) for the matrix term **Site** and adds it to both items. SAP Ariba creates a second entry for each item so the table now has 4 entries. Each new entry has the value **Nagoya, Japan** for the **Site** term. The following illustration shows the new entries, circled in green:



Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Create a new term or open editing options for an existing term .

To...	Complete these steps:
Create a new term	1. Use one of the following methods to open the **Add terms** page: • To create a term and add it to all items, click the **Add terms** button at the top of the item table. • To create a term and add it to specific items, check the selection box for the items. Click the **Add terms** button at the top of the item table. • To create a term and add it to a single item, click the more icon (•••) for the item and select **Add terms**. 2. Select **Create new term**.
Open editing options for an existing term	• To edit a term for a specific item: 1. Hover over the term in a row for an item. If the term is editable, an edit icon ( ) or a clickable **Set initial value** link shows. Select the edit icon or link. A popup opens with the term name and basic attributes. 2. Select **See all options**. • To edit a term for all items: 1. Locate the top entry for the column for the term and select the more icon (•••) next to the term name, then select **Edit term for all items**. A popup opens for the term. 2. Select the **Term attributes** tab.

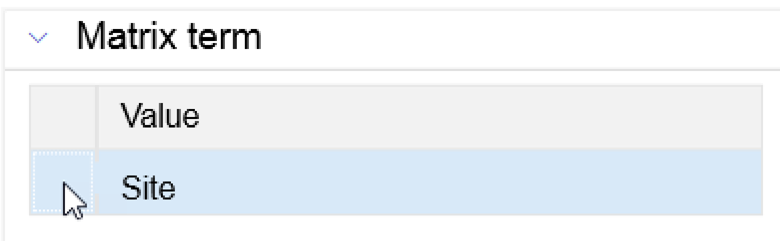
3. Set the **Is this a matrix term?** rule to **Yes**. **Yes** is available only when these conditions are met:
   - The response type is one of the following:
     - **Text** and **Short answer**
     - **Number**, **Decimal**, or **Percentage** and **Any value**
     - **Date** and **Any date**

- **Is a response required?** is set to **Yes, an event owner must respond - participants cannot respond** or **Yes, an event owner must respond - participants can optionally respond**.
- **Can participants see this term?** is set to **Yes** or **Yes, only after participants answer the prerequisite questions**.
- **Use participant-specific initial values?** is set to **No**.

4. Save the term settings and return to the **Items that need quotes** table.
5. Use the selection boxes on the left side of the items table to choose the items that contain a matrix term or terms and that you want to add matrix entries for.
6. Select **Edit matrix**.

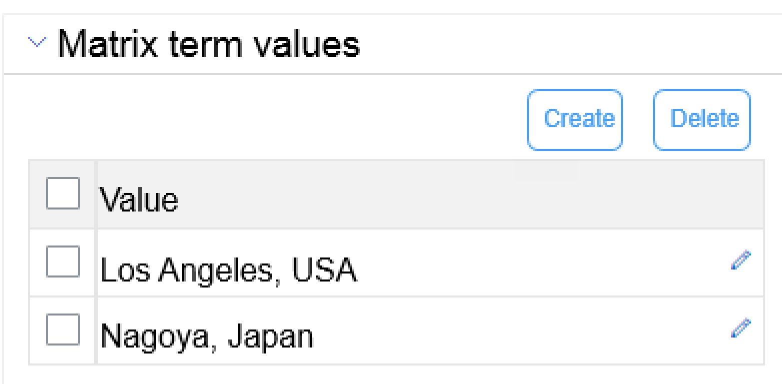
   The **Edit matrix** page opens with the **Define matrix** tab and the following tables:
   - **Matrix term** table: Contains the matrix terms that are common to all items you chose on the previous page.
   - **Matrix term values** table: Contains the values for the matrix term selected in the **Matrix term** panel.
   - **Items** table: Contains a row for each item selected on the previous page and a column for each matrix term value. You'll use the checkboxes to specify which matrix values are applied to each item.
7. In the **Matrix term** table, hover over the column to the left of the matrix term you want to use for creating matrix entries and click the selection box that appears. The selected term is then highlighted in blue.

   For example, you want to create matrix entries using the term **Site**:



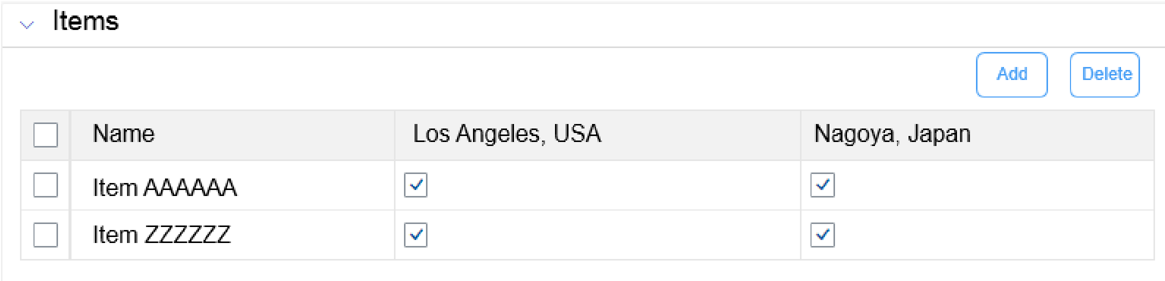
8. In the **Matrix term values** panel, add new values for the matrix term.
   a. Select **Create**.
   b. Enter a value (or choose a value from a selector, if present) for the matrix term.
   c. Select **Save**.

   For example, you have a matrix term named **Site** with the initial value **Los Angeles,USA**. You add the value **Nagoya, Japan**:



9. In the **Items** panel, use the checkboxes to select the items and matrix terms that you want to create entries for.

For example, the following configuration shows the matrix term values **Los Angeles,USA** and **Nagoya, Japan** selected for **Item AAAAAA** and **Item ZZZZZZ**:



10. **Optional:** Select the **View matrix** tab near the top of the page to see a preview of the items table after your changes are applied.
11. Navigate to the upper-right corner of the page and select **Apply**.

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Adding Formulas to Guided Sourcing Events

This procedure demonstrates how to use formulas to create terms that are calculated from other terms.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- To create a formula in an event, the event rule **Can project owner create formulas** must be enabled (set to **Yes**). If you are working with an event (not an event template) and the **Add formula** button doesn't appear in the **Terms** area of the **Edit item** popup, you have created the event from a template with the rule **Can project owner create formulas** set to **No**.

Context

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:

> ⚠ Restriction
>
> To use responses to questions in a formula for guided sourcing events, you must create the formula in the event template.

SAP Ariba Sourcing supports a number of built-in functions for formulas. For more information about creating formulas in events, see Event formulas in the *Event management guide*.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** and locate a line item that you want to add the formula to. Click the more icon (▫▫▫) for the line item.

   The **Edit item** popup opens.
3. In the **Terms** area of the **Edit item** popup, click **Add formula**.

   The **Add formula** page opens.

4. Choose a **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.
5. In the table labeled **Term Names**, find the term you want to use in the formula and click **Insert**. This places the term in single quotes in the **Formula** field.
6. 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.
7. In the table labeled **Term Names**, 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.
8. Repeat the above steps until the formula is complete. Verify that the area below the **Formula** field is green and shows the status **Valid Formula**.
9. Select an option for **Is a response required?**, which applies to all terms used in the formula.

   If you select an option that requires participants or the event owner to respond, they must provide responses for all terms used in the formula.
10. Select an option for **Can participants see this term?**, which applies to the calculated value of the formula.

    Options:
    - **No** (only available when **Is a response required?** is **No** or **Yes, an event owner must respond - participants cannot respond**): The term is never visible to participants (suppliers). Use this option to hide content that you regard as confidential or sensitive from potential participants.
    - **Yes** (the default): The term is always visible to participants.
    - **Yes, only after participants answer the prerequisite questions**: Participants (suppliers) only see the term after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391]. The prerequisite can also be configured so that an event owner must approve a response to satisfy the prerequisite.
11. Select an option for **Does the term have a historic value?**, which applies to the formula.

    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.

    Options:
    - **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.
12. Select an option for **Roll up the value to the section summary**, which applies to the calculated value of the formula.

Options:

- **No** (the default)
- **Yes**: If line items with this term are organized in a section, add up (roll up) this term's value for all line items in a section and display the value.

13. Select an option for **Choose how to rank bids if this will be a competitive term**, which applies to the calculated value of the formula.

    You can designate a term as the **competitive term** for an item and have SAP Ariba Sourcing rank responses based on that term. For example, you can configure **Price** or **Extended Price** as the competitive term for an item. Any numeric term (**Money**, **Number**, **Decimal**, **Quantity**, **Percentage**) or term calculated from a formula can be a competitive term.

    If you want this term to be the competitive term, first select a value for **Choose how to rank bids if this will be a competitive term** to make this term a possible competitive term.

    Options:

    - **This will not be a competitive term**
    - **Lower is better**: This will be a competitive term and the lowest value is the best value.
    - **Higher is better** This will be a competitive term and the highest value is the best value.

    After you configure a term as a competitive term, you can select it as the competitive term for some or all items in your event, as described in Configuring Competitive Terms in Guided Sourcing Events [page 352].

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Adding Requirements and Attachments to Guided Sourcing Events [page 397]

Adding Lookup Formulas to Guided Sourcing Events

Use this procedure to add lookup formulas in a guided sourcing event when you create or edit a guided sourcing event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- The ICM parameter **Application.ACM.EnableDynamicLookUpTable** must be enabled for your site.
- You must be a member of the **Template Creator** group.

Context

You can create lookup formulas in guided sourcing events by including lookup table entries in formula terms.

Procedure

1. When you create or edit a guided sourcing event, from the add item or edit item flow, click **Add formula**.

   The **Add formula** page appears.
2. Enter a **Name** for the lookup formula.
3. 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.
4. 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 ouput** dropdown appears.
5. Click **Insert** corresponding to the lookup terms that you want to include in the lookup formula.
6. From the **Lookup table ouput** dropdown, select the output column in the lookup table.
7. Click **Add** to save the formula.

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Adding Material Master Items to Guided Sourcing Events

If your site has item master data imported from an external system, you can use this procedure to add material master items to your event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must have enabled the ICM parameter **Unified material master data search for sourcing events** (`Application.AQS.RFX.EnableUnifiedMaterialMasterSearch`) to access the unified workflow for adding items from master data to events. For more information on the parameter, please seeUnified material master data search for sourcing events.
- Your site must be integrated with an external system for master data, as described in *Common data import and administration guide for SAP Ariba Strategic Sourcing and Supplier Management solutions*.

Context

Buyers can create guided sourcing events and use the material master data imported from integrated external systems, such as ERP, to define and categorize the items to purchase. If you have integrated with product sourcing, you can also create a guided sourcing event by initiating a material quote.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon (•••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel and click **Add** > **Item from material master**.

   If you want to add the material master item to a section, select **Add** > **Section** to add a section. Then select the section by clicking the corresponding checkbox and then select **Add** > **Item from material master**. Alternatively, you can also select the corresponding three dots (•••) icon under the **Actions** column and select **Add master data item**.

   > Note
   >
   > If the guided sourcing event is created from product sourcing as part of the material quote process, then the selected material master items are already listed under the **Items that need quotes** panel.

3. If your site is integrated with multiple external systems but you didn't select a system for the **External system** field when you created the project, you must select one now.

   If your site is integrated with only one external system, the external system is automatically configured for all events and the **External system** popup doesn't open; go to the next step.

   A popup opens with the **External system** field.

   Select the external system that is the source of the material master item data which contains the item you want to add. Click **Apply**. The external system you select is configured for the event.
4. The **Add items from material master** search page opens. Enter search terms for the material name, description, material group, or material number in the search bar.

   Searches are not case sensitive, and search terms match item field values that begin with the search term. For example, the search term `sodi` matches items with `sodium` in its field values.

   Searches also use stemming when matching words in material names and descriptions. Stemming strips common suffixes, or stems, at the ends of words to match them. For example, the search terms `salts` and `salting` both match `salt` in English. The search term `carbonized` matches `carbon` and `carbonate`.
5. **Optional:** Select filter values to narrow your search results.

   The available filters are:
   - **Region**
   - **Commodity**
   - **Plant**
6. **Optional:** If an item has one or more plants associated with it, select plants from the **Add Plant** dropdown.

7. Check the selection boxes for the items you want to add.
8. Click **Add to event**.

Results

The selected master data items are added to the guided sourcing event and are listed under the **Items that need quotes** panel.

Following are some scenarios to explain how the material items are arranged under the **Items that need quotes** panel.

Scenario	Additional Criteria	Material Master Item Arrangement
Add material master items.	-	The items are listed under the **Items that need quotes** panel.
Select a section under the **Items that need quotes** panel and add material master items.	-	The items are added to the selected section.
Select multiple sections (for example, Section A, Section B, and Section C) under the **Items that need quotes** panel and add material master items.	Section A is added first, followed by Section B and Section C.	The items are added to Section A. **Note** If you select Section B and Section C, the items are added to Section B.
Select a section and a sub-section added under the section and add material master items.	-	The items are added to the selected section.
Select a section (for example, Section A) and sub-section of another section (for example Section B) and add material master items.	Section B is created before Section A	The items are added to Section B.
Select a line item and add a material master items	-	The material master items are placed after the selected line item.
Select multiple line items (for example, Item A, Item B, and Item C) and add material master items	Item A is added first, followed by Item B and Item C.	The material master items are placed after **Item A** as it is the foremost line item added to the event.

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Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]

Adding an Item from Article Master to a Guided Sourcing Event

Use this procedure to manually add items from article master to a guided 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.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

You must also 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

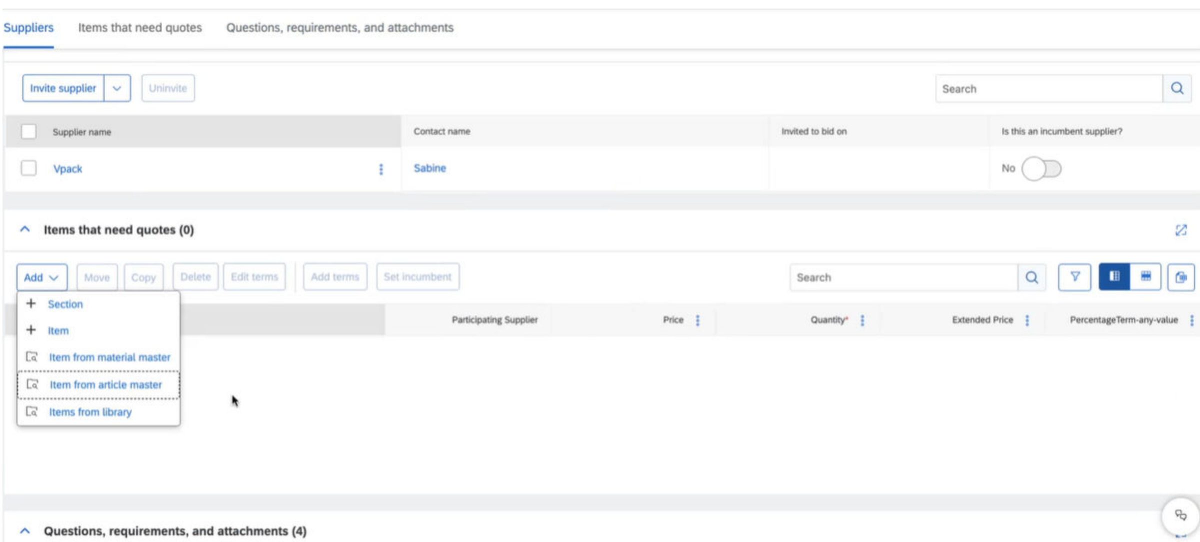
Junior Sourcing Agent
Limited Event Administrator (access to this group must be approved by the SAP Ariba Market Coordination Team)
Procurement Agent
Sourcing Agent
Sourcing Approver
Sourcing Project Administrator (access to this group must be approved by the SAP Ariba Market Coordination Team)

Context

> **Note**
>
> When you search for items from article master to add to an event, you cannot search by category. However, if your site has the "Commodity support for Category Attribute Hierarchy" feature enabled, you can automatically add content to events based on the commodity values for items.

Procedure

1. After you've created an event, select **Add** > **Item from article master** under **Items that need quotes**.



2. Type in the search field to search by article ID or article name.
3. If an external system has not been set for the event already, select the external system from which the article was integrated or imported.
4. Type in a filter field to search for a filter option or select the menu icon to show all filter options for the item.
5. When you have made your filter selections, click on the **Apply** button to apply your filter.
6. 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.

7. Select **Add** to add the selected items to the event.

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Service Items and Service Hierarchies in Guided Sourcing Events

Guided sourcing event content can include items for services, such as consulting and maintenance services.

The service items can be organized into the following structural hierarchy that contains service lines, service outlines, and service specifications:

- **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. 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.

Prerequisites

See Adding Service Items to Guided Sourcing Events [page 371].

Restrictions

- The maximum levels of a service hierarchy is determined by the parameter `Application.AQS.RFX.Services.MaxHierarchyDepth`, which needs to be configured by SAP Ariba Support. The default value for this parameter is **5**, which means a service hierarchy can have a service line level, a maximum of four levels of service outlines, and multiple service specifications.
- Service lines and service specifications can have terms, but service outlines do not contain any terms.
- Guided sourcing does not support cost breakdowns for service items in bid analysis.

Alternative Bidding for Service Items

If alternative bidding is enabled (with the event rules **Can participants create alternative responses?** and **Can participants create alternative pricing?** both set to **Yes**), suppliers can submit alternative bids for service items (service lines, service outlines, and service specifications). If the RFP contains a large amount of service items, it is cumbersome for suppliers to create alternative bid proposals for each item on the user interface. In this case, suppliers can submit alternative bids for service items using Microsoft Excel spreadsheets. For more information on how to use Microsoft Excel spreadsheets to submit alternative bids, refer to Submitting Alternative Bids Using Microsoft Excel Spreadsheets.

Multi-Round Bidding for Service Items

If multi-round bidding is enabled (with the event rule **Enable multi-round bidding** set to **Yes**), service items can be included in or excluded from a new bidding round.

Support Multi-Currency for Service Items

If multi-currency is enabled (with the event rule **Allow participants to select bidding currency** set to **Yes**), suppliers can choose the bidding currency for the service lines they plan to bid on in primary and alternative responses. Suppliers can choose one bidding currency for all service lines or choose a different bidding currency for each service line.

Support Supplier-Added Service Items

If supplier-added items are allowed (with the event rule **Allow suppliers to add items** set to **Yes** and the **Supplier Item with Child Items or Service Hierarchy** prototype defined in a guided sourcing template), suppliers can add additional service items other than what the buyer has defined to primary and alternative bids or only to alternative bids. Suppliers can achieve this by adding a lot first and uploading an attachment file containing service items to the lot. Note that guided sourcing does not process the content contained in the attachment, but just displays the attachment on the user interface. Buyers can download the attachment to view the service items in the attachment.

Auctions Support Service Items

Auctions in guided sourcing support service hierarchies. Note that the auction template must have **Service Line** and **Service Specification** defined. Otherwise, you cannot add service items to auction events.

Bid Analysis Support Service Items

If bid analysis is enabled (with `Application.ACM.EnableBidAnalysisTab` set to **Yes**), you can analyze and compare bids for service items at service line, service outline or service specification level. However, the cost breakdown information in bid analysis does not include service items.

Integartion with External Systems

- To exchange service item data with an SAP ERP for guided sourcing, install and configure version 1.2.034 or later of the Ariba cXML Adapter, which supports the `quoteRequest` and `quoteMessage` element attributes for multi-level service item hierarchies. For details about how to install and configure the cXML adapter, refer to RFQ and Award Integration with SAP Ariba Sourcing. The `quoteRequest` and `quoteMessage` element attributes for service hierarchies in guided sourcing events follow the same logic and processing flow as those in classic sourcing events. For more informaton about the `quoteRequest` and `quoteMessage` element attributes, refer to SAP Service Items and Service Hierarchies (CXML Adapter Version 1.2.034 or Later).
  If the SAP RFQ and award Integration with SAP Ariba Sourcing feature is enabled, your organization can receive RFQs from SAP ERP with service items and send award data back to SAP ERP with service items. Currently, guided sourcing only supports sourcing requests created from ECC network RFQs (network RFQs sent from SAP ERP Central Component systems). You can create a guided sourcing project from a sourcing request that is generated from an ECC network RFQ. You can also add service items from the sourcing request to events in the guided sourcing project by using the **Add** › **Items from sourcing request** menu option under the **Items that need quotes** panel.

- If you use the SOAP web services **Download RFX Awards**, **Download RFX Awards with Filters**, and **Export RFX Awards**, award information from guided sourcing events includes any service items in the award. For details about these web services, refer to the SOAP Web Service API Integration Guide.
- If you use the `External Approval API for Sourcing, Contracts, and Supplier Management`, guided sourcing event information returned by the API includes any service items in the event. This API already exists in the classic sourcing system and no change is made when it is used by guided sourcing. For more information about this API, refer to External Approval API for Sourcing and Supplier Management.

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Capturing Detailed Cost Breakdowns

Adding Service Items to Guided Sourcing Events

Use service items to source services, such as consulting or maintenance services.

Prerequisites

To use service items in guided sourcing events:

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- 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 roll up pricing of service hierarchies in alternative bids, 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 **Service Line** and **Service Specification** defined. You can also add terms for service lines and service specifications in the template. For details about the terms, refer to "Service items and service hierarchies" in About the Definitions Tab (Item Definitions in Templates).

Context

You can organize service items into a structural hierarchy that contains service lines, service outlines, and service specifications as follows:

- **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. 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.

> ⚠ Restriction
>
> - The maximum levels of a service hierarchy is determined by the parameter `Application.AQS.RFX.Services.MaxHierarchyDepth`, which needs to be configured by SAP Ariba

Support. The default value for this parameter is **5**, which means a service hierarchy can have a service line level, a maximum of four levels of service outlines, and multiple specifications.

- Service lines and service specifications can have terms, but service outlines do not contain any terms.
- Guided sourcing does not support cost breakdowns for service items in bid analysis.

Procedure

1. Create or edit a guided sourcing template, set the bidding rules based on your needs, and add **Service Line** and **Service Specification** to the **Definitions** tab in the **Content** section.
2. Create a guided sourcing event using the template you published in step 1.
3. Add service lines.
    a. Under the **Items that need quotes** panel, click **Add**, and then select **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.
    b. Enter a **Name** and **Description**.
    c. **Optional:** Add a term.
    d. Click **Add**.

       After a service line is created, you can click **Add term** to add a term for the service line, and click **Set initial value** to set an initial value for a term.
4. **Optional:** Add service outlines.

   Service outlines are optional and are only used to organize service specifications. Service outlines do not contain terms.

   If the parameter `Application.AQS.RFX.Services.MaxHierarchyDepth` uses the default value **5**, a service hierarchy can contain up to 4 levels of outlines.
    a. Click the more actions icon ··· next to a service line and choose **Add service outline** from the pop-up menu.
    b. Enter a **Name** and **Description**.
    c. Click **Add**.
5. Add service specifications.

   Service specifications can be added to a service line or service outline.
    a. Click the more actions icon ··· next to a service line or service outline and choose **Add service specification** from the pop-up menu.
    b. Enter a **Name** and **Description**.
    c. Select a commodity and region.
    d. Enter values for terms.
    e. Click **Add**.

Adding an Ad Hoc Item to Article Master Data in Guided Sourcing

If an ERP is selected at event level, you can use this procedure to add an ad hoc item that you create in a sourcing event to article master data.

Prerequisites

- This feature requires the guided sourcing capability and you must be a member of the Category Buyer group.
- Category attribute hierarchy must be enabled in your site.
- This feature requires SAP Integration Suite, managed gateway for spend management and SAP Business Network (CIG) integration between SAP Ariba Sourcing and your ERP system.
- Your administrator must enable the following parameter in **Manage** > **Administration** > **Intelligent Configuration Manager**:
  - `Application.ACM.EnhancedArticleDataCreation.Enabled`. See Enable enhanced UI for article data creation.
- An external ERP system must be selected at event level.
- The **Material Type** and **Material Number**, and **Material Group** terms must be added to the item. A value must be added for the Material Type term.
- The Quantity field must have a unit of measure.
- A category must be set.

Context

If an ad hoc item that you create in a sourcing event does not exist in your article master data, you can do one of the following things:

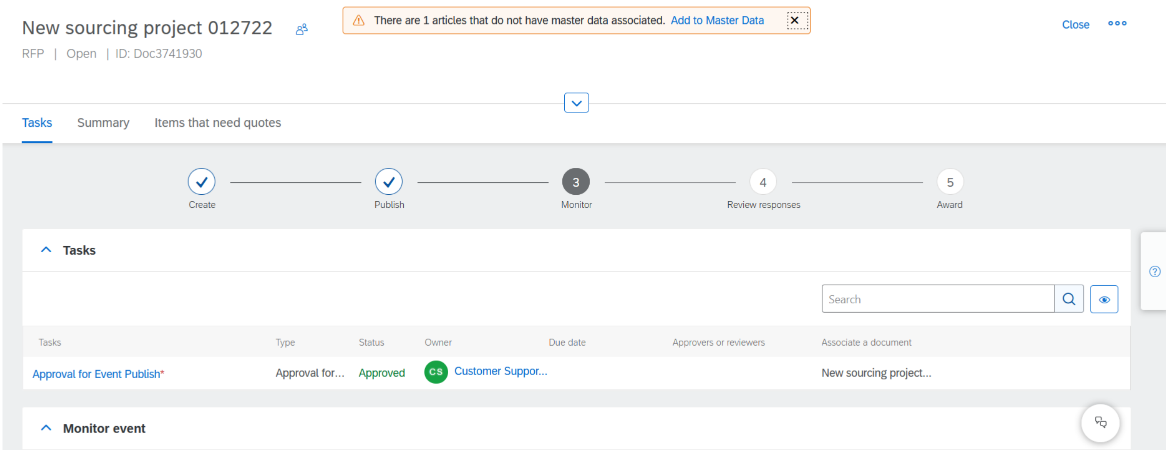
- Send the item details to your ERP through the SAP Integration Suite, managed gateway for spend management and SAP Business Network and have the Material Number confirmed by the ERP and sent back you the SAP Ariba Sourcing system.
- Create the article in your ERP, copy the Material Number from there, and then paste the Material Number into your sourcing system to let the sourcing system know that the article exists in article master data.

Restrictions:

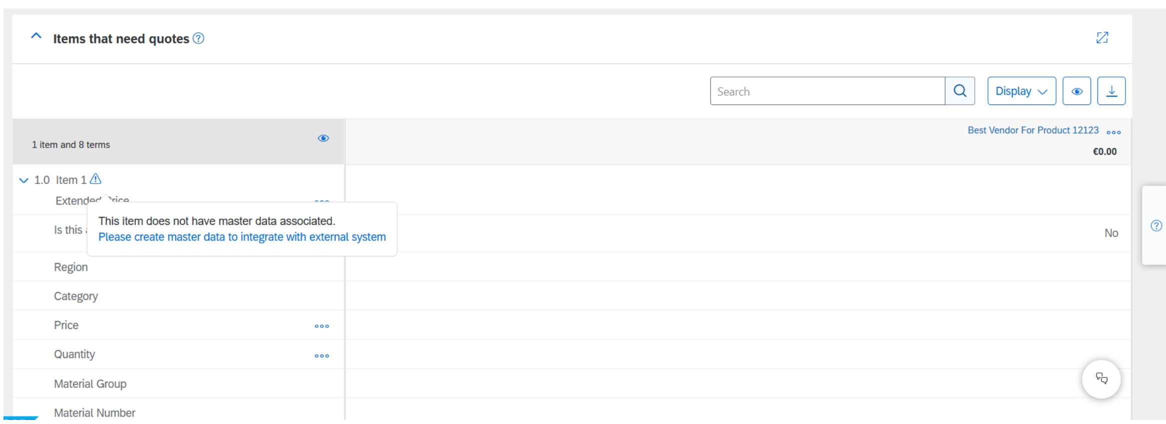
- This functionality is only supported for Article Master integrated realms.
- This feature does not support the creation of new displays and linked articles/variants (within the display) at the same time.
- You can only create up to 100 article master data objects at a time using this functionality. This limit also applies to extending articles/variants to plants.

Procedure

1. When adding an ad hoc item to an event, if that item does not exist in article master data alerts are displayed to let you know that the article you are creating is not in your article master data. Do one of the following:
    - On the event content page, select the **Add to Master Data** link at the top of the page.



    - On the event content page, hover over the warning icon beside the item name and click on the **Please create master data to integrate with external system** link.



    - On the award confirmation dialog box, select the **Add to Master Data** link at the top of the dialog box. (Note that this option is only displayed when Yes is selected for **Do you want to create follow-on documents?**.)
2. (Optional) Use the **Search**, **Status**, or **Commodity Categories** filters to locate the item.
3. Select the new item and do one of the following:
    - If you have not already created the item in your ERP, select **Send Articles** to send the item details to your ERP through the SAP Integration Suite, managed gateway for spend management and SAP Business Network. Once the Material Number is confirmed by the ERP it is updated in the SAP Ariba Sourcing system, and the value is updated in the Material Number field for the item.
    - If you have already created the article in your ERP and you now want to create it in the sourcing system, copy the Material Number from there, then paste the Material Number into the ID field on this page and select **Mark Created**. This lets the sourcing system know that the article exists in your ERPs article master data. When the item status is updated to Created the value in the Material Number field is updated for the item.

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Adding Product Questionnaires as Terms in Guided Sourcing Events

Product questionnaires contain groups of questions. You can use this procedure to add multiple questionnaires to a line item as terms.

Prerequisites

- Category attribute hierarchy must be enabled in your site.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

You can create a term of type Product Questionnaire, and you can associate a product questionnaire from the category attribute hierarchy with the term as the initial value for that term.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Use one of the following methods to open the **Add terms** page:
   - To create a term and add it to multiple items, check the selection box for the items. Click the **Add terms** button at the top of the item table.
   - To create a term and add it to a single item, click the more icon (▫▫▫) for the item and select **Add terms**.
3. On the **Add terms** page, click **Create new term**.
4. Select the **Product Questionnaire** tab.
5. Select a product questionnaire from the **Initial value** pull-down menu to associate with the term. The Initial value list contains product questionnaires that are stored in the category attribute hierarchy library of product questionnaires.

   If you invited suppliers (participants) to the event, you can also specify different initial values for each supplier (participant-specific initial values):
   a. Slide the toggle for **Set participant-specific initial value** to **On**.

      A table with the suppliers you have invited to the event opens at the bottom of the page.
   b. Enter participant-specific initial values in the rows to the right of the contact names.

   When you view the **Items that need quotes** table, terms with participant-specific values are indicated by the following icon: .
6. **Optional:** To add a reference document specific to this term, use the **References** file upload area (**Drag file here or browse to upload**) to drag and drop or select a file.

   A link that that enables suppliers to download the reference document will be shown only for line items that include this term.

   You can also add attachments for the entire event in the **Questions, requirements, and attachments** panel.
7. Select an option for **Is a response required?**

   Options:
   - **No**
   - **Yes, participants must respond** (the default): Participants (suppliers) must include a response for this term to submit their bids (responses) for the event.
   - **Yes, an event owner must respond - participants cannot respond**: Select this option for terms you require an event owner to specify, either because participants need the information to submit responses (for example, this option is set for the term **Quantity**), or for terms you use for internal analysis or reporting.
8. Select an option for **Can participants see this term?**

   Options:

- **No** (only available when **Is a response required?** is **No** or **Yes, an event owner must respond - participants cannot respond**): The term is never visible to participants (suppliers). Use this option to hide content that you regard as confidential or sensitive from potential participants.
- **Yes** (the default): The term is always visible to participants.
- **Yes, only after participants answer the prerequisite questions**: Participants (suppliers) only see the term after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391]. The prerequisite can also be configured so that an event owner must approve a response to satisfy the prerequisite.

9. Select an option for **Is term editable in alternatives?** to determine whether the term can be answered by a supplier when they create an alternative bid.

> ⓘ Note
>
> 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.

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Viewing, Editing, or Removing a Product Questionnaire Line Item Term in a Guided Sourcing Event

After you have added a product questionnaire term to an event, you can use this procedure to view, edit, or remove the product questionnaire that is associated with the term.

Prerequisites

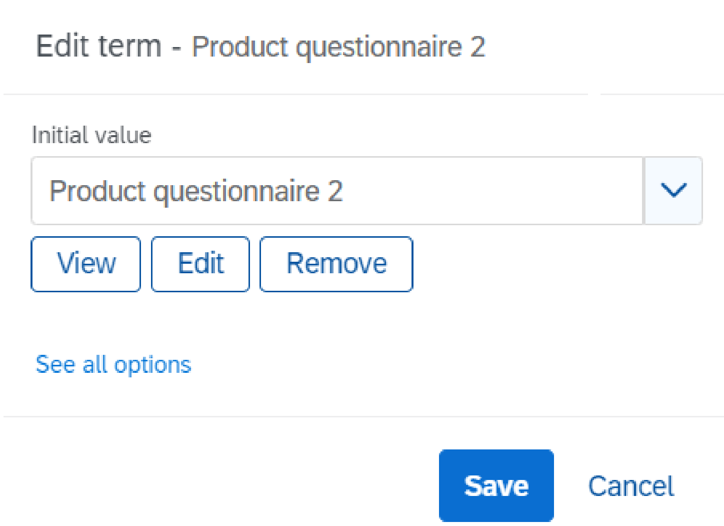
- Category attribute hierarchy must be enabled in your site.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel.
3. Click on the product questionnaire link for the product questionnaire term you want to edit. Terms you can edit show an edit icon ( ) or a clickable link.

   A popup opens with the initial value product



   questionnaire.

4. Do any of the following:
    - To select a different product questionnaire as an initial value, select one from the **Initial value** pull-down menu.
    - To view the selected product questionnaire, select **View**.
    - To edit the selected product quuestionnaire, select **Edit**.
    - To remove the initial value product questionnaire, select **Remove**.
    - To set additional term options, click on **See all options**.

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Adding a Category Attribute Hierarchy Item to a Guided Sourcing Event

Use this procedure to add a category attribute hierarchy item to a guided sourcing event. When Category Attribute Hierarchy is enabled in your site, you can select a merchandise category from a specific external ERP system when adding an item to a guided sourcing event, and all objects that are associated with that category in the category attribute hierarchy, such as terms, questions, requirements, documents, and so forth, are added to the event automatically.

Prerequisites

- Category attribute hierarchy must be enabled for your site.
- Commodity sync (SRR-1329) must be disabled. Note that if this is enabled, the Category field is not displayed.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

You must also 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
>
> The following must be disabled in your site:
>
> - The `Application.ACM.SyncCommoditiesToDynamicSourcingLibrary.Enabled` parameter at **Manage** > **Administration** > **Intelligent Configuration Manager**. This is disabled by default. For more information, see Enable Dynamic Sourcing Library based on commodity structure.

Context

When you change the **Category** field value on the **Add item** popup, SAP Ariba validates whether the new category value and the event header fields are associated with item definitions in the category attribute hierarchy. If the new category value and the event header fields are associated with item definitions in the category attribute hierarchy, SAP Ariba automatically replaces the terms in the line item with the category attribute hierarchy terms. If necessary, you can click **See all options** to view all the terms associated with the category attribute hierarchy.

When you change the **Category**, **Commodity**, or **Region** values, SAP Ariba validates whether the new values and the event header fields are associated with item definitions in the category attribute hierarchy. If the new values are associated with item definitions, SAP Ariba automatically replaces the event template line item terms with the category attribute hierarchy terms. User created terms are not replaced.

If the new values are not associated with item definitions in the category attribute hierarchy, SAP Ariba automatically populates the line item terms with terms from the event template.

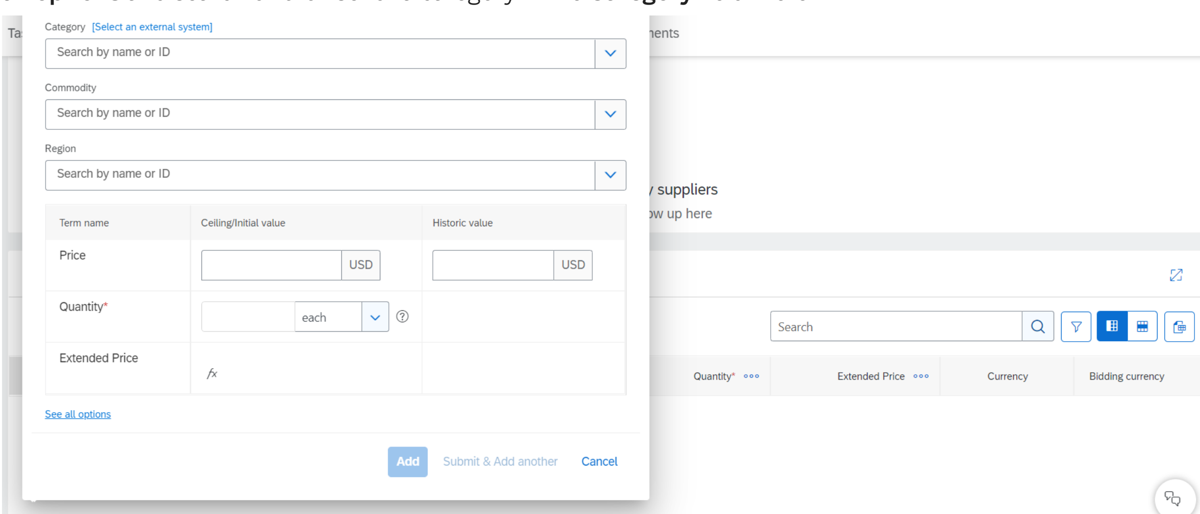
SAP Ariba preserves the existing order of terms in a guided sourcing line item when it automatically replaces the event template terms with the category attribute hierarchy terms. When SAP Ariba adds category attribute hierarchy terms that are not in the line item and the event, the terms appear after the list of existing terms.

When the first line item contains terms that are associated with values in the category attribute hierarchy, SAP Ariba automatically adds the category attribute hierarchy terms to subsequently created line items. If existing line items contain that are not associated with values in the category attribute hierarchy, SAP Ariba adds terms from the event template in subsequently created line items.

Procedure

1. After you've created an event, select **Add** > **Item** under **Items that need quotes**.
2. Do one of the following to select an external ERP system from which a category attribute hierarchy will be pulled:
   - If an external system was selected in the sourcing event header, it is listed beside the **Category** field. If you want to change to another external system, click on the existing external system name and select an alternative system in the external system popup.

     > **Note**
     >
     > If you change the external system, any categories you had selected in the Category field are erased , and any objects that were added to the event because they were associated with that category are also removed. The following warning is displayed on the top of the page when you switch to another external system: "Switching to a new external system will reset currently selected categories."
   - If no external system is displayed beside the **Category** field, click on **Select an external system** to add an external system from which a category attribute hierarchy will be pulled.
3. Search or browse for a category in the **Category** field. You can also select **See all options** and search or browse for a category in the **Category** field there.

   You can search the category attribute hierarchy by category name or ID. If you are searching by category name, typeahead search is available and recent searches in the current external system are also displayed.

   Or you can select the menu icon to display a category tree, where you can browse for and select a category. If a category does not have a name, only the category ID is displayed in the category tree.
4. Select **Add**.

All objects that are associated with the selected category in the category attribute hierarchy and that meet any other criteria defined in the content rule, such as terms, questions, requirements, documents, and so forth, are added to the event automatically.

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]
Configuring Competitive Terms in Guided Sourcing Events [page 352]
Configuring Matrix Terms in Guided Sourcing Events [page 354]
Adding Formulas to Guided Sourcing Events [page 358]
Adding Lookup Formulas to Guided Sourcing Events [page 361]
Adding Material Master Items to Guided Sourcing Events [page 362]
Adding an Item from Article Master to a Guided Sourcing Event [page 365]
Service Items and Service Hierarchies in Guided Sourcing Events [page 367]
Adding an Ad Hoc Item to Article Master Data in Guided Sourcing [page 373]
Adding Product Questionnaires as Terms in Guided Sourcing Events [page 375]
Viewing, Editing, or Removing a Product Questionnaire Line Item Term in a Guided Sourcing Event [page 378]
Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event [page 382]
Linking Items to a Basket Lot in Guided Sourcing [page 385]

Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event

Use this procedure to add a category attribute hierarchy lot to a guided sourcing event. When Category Attribute Hierarchy is enabled in your site, you can select a merchandise category from a specific external ERP system when adding a lot to a guided sourcing event, and all objects that are associated with that category in the category attribute hierarchy, such as terms, questions, requirements, documents, and so forth, are added to the event automatically.

Prerequisites

- Category attribute hierarchy must be enabled for your site.
- Commodity sync (SRR-1329) must be disabled. Note that if this is enabled, the Category field is not displayed.
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must enable the following parameter in **Manage** > **Administration** > **Intelligent Configuration Manager**:
  - `Application.ACM.DefinitionsInCAHAndDynamicSourcingLibrary.Enabled`. See Enable the item and lot definition support in Category Attribute Hierarchy and Dynamic Sourcing Library.
- You must have a lot definition in the event template to add a lot definition from the Dynamic Sourcing Library or category attribute hierarchy.

You must also 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
>
> The following must be disabled in your site:
>
> - The `Application.ACM.SyncCommoditiesToDynamicSourcingLibrary.Enabled` parameter at **Manage** > **Administration** > **Intelligent Configuration Manager**. This is disabled by default. For more information, see Enable Dynamic Sourcing Library based on commodity structure.

Context

When you change the **Lot Type** field value on the **Add item** popup, SAP Ariba validates whether the commodity and category values are associated with lot definitions in the category attribute hierarchy. If the new lot type value has commodity or category values associated with lot definitions in the category attribute hierarchy, SAP Ariba automatically replaces the terms in the lot with the category attribute hierarchy terms. If necessary, you can click **See all options** to view all the terms associated with the category attribute hierarchy. User created terms are not replaced.

If the lot type value does not have commodity and category values associated with lot definitions in the category attribute hierarchy, SAP Ariba automatically populates the lot terms with terms from the event template.

SAP Ariba preserves the existing order of terms in a sourcing line item when it automatically replaces the event template terms with the category attribute hierarchy terms. When SAP Ariba adds category attribute hierarchy terms that are not in the line item and the event, the terms appear after the list of existing terms.

Procedure

1. After you've created an event, select **Add** > **Lot** under **Items that need quotes**.
2. Do one of the following to select an external ERP system from which a category attribute hierarchy will be pulled:
    - If an external system was selected in the sourcing event header, it is listed beside the **Category** field. If you want to change to another external system, click on the existing external system name and select an alternative system in the external system popup.

      > Note
      >
      > If you change the external system, any categories you had selected in the Category field are erased , and any objects that were added to the event because they were associated with that category are also removed. The following warning is displayed on the top of the page when you switch to another external system: "Switching to a new external system will reset currently selected categories."
    - If no external system is displayed beside the **Category** field, click on **Select an external system** to add an external system from which a category attribute hierarchy will be pulled.
3. Search or browse for a category in the **Category** field. You can also select **See all options** and search or browse for a category in the **Category** field there.

    You can search the category attribute hierarchy by category name or ID. If you are searching by category name, typeahead search is available and recent searches in the current external system are also displayed.

    Or you can select the menu icon to display a category tree, where you can browse for and select a category. If a category does not have a name, only the category ID is displayed in the category tree.
4. Select **Add**.
    All objects that are associated with the selected category in the category attribute hierarchy and that meet any other criteria defined in the content rule, such as terms, questions, requirements, documents, and so forth, are added to the event automatically.

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]

Linking Items to a Basket Lot in Guided Sourcing

If the template that your sourcing event is based on is configured for basket lots with linked items (also known as prepacks), you can use this procedure to link items that exist already in an event to a basket lot.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

When you link an item to a lot, a copy of the line item that already exists outside the basket lot is added to the lot. The line item copy inside the lot is linked to the source line item so that any changes that are made to the price term in the line item outside the lot are also reflected in the line item copy inside the lot. The quantity term is the only term that is editable for item copies within the lot. The value of every other term is copied over to the copied item within the lot, and cannot be edited in the copy. If an initial value was set for quantity in the source term, that is copied with the lot in the first instance, but this can be edited in the item copy.

> ⓘ Note
>
> You can only link items that were not created in another lot.

Restrictions

- You cannot use the **Move** or **Copy** buttons on the **Items that need quotes** panel to add items to a prepack.
- Only the quantity field is editable on the mass edit popup for linked items within a basket lot. (If you edit the price term in a source item as part of a mass edit, that change is reflected in linked items within a basket lot.)

- Only Simplified and Standard Excel document formats are supported for prepacks.
- **Add master data item** is not available as an option for basket lots with linked items.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Items that need quotes** panel and click on the more icon (•••) for the lot to which you want to link an item and select **Link item**.

   The **Select Basket Items** popup opens.
3. Select the item that you want to link to the lot and click on **Save**.

Task overview: Items That Need Quotes (Lots and Line Items) in Guided Sourcing Events [page 328]

Related Information

About the Items That Need Quotes Panel [page 330]
Adding Sections to Guided Sourcing Events [page 333]
Adding Lots to Guided Sourcing Events [page 335]
Adding Line Items in Guided Sourcing Events [page 337]
Editing Line Items in Guided Sourcing Events [page 343]
Creating Terms in Guided Sourcing Events [page 347]
Configuring Competitive Terms in Guided Sourcing Events [page 352]
Configuring Matrix Terms in Guided Sourcing Events [page 354]
Adding Formulas to Guided Sourcing Events [page 358]
Adding Lookup Formulas to Guided Sourcing Events [page 361]
Adding Material Master Items to Guided Sourcing Events [page 362]
Adding an Item from Article Master to a Guided Sourcing Event [page 365]
Service Items and Service Hierarchies in Guided Sourcing Events [page 367]
Adding an Ad Hoc Item to Article Master Data in Guided Sourcing [page 373]
Adding Product Questionnaires as Terms in Guided Sourcing Events [page 375]
Viewing, Editing, or Removing a Product Questionnaire Line Item Term in a Guided Sourcing Event [page 378]
Adding a Category Attribute Hierarchy Item to a Guided Sourcing Event [page 379]
Adding a Category Attribute Hierarchy Lot to a Guided Sourcing Event [page 382]
Configuring a Sourcing Event Template for Basket Lots with Linked Items

About Prepacks in Excel Imports to Guided Sourcing

Prepacks can be imported to guided sourcing events as part of an Excel document.

If the event template is configured for basket lots with linked items, a new column called "LinkedItemId" is added to the Excel document. The item ID of the linked item must be listed in this column for each basket lot to which it was added. In the example below, line item 5301 was added as a linked item in basket lots 5300 and 5404. Each linked item copy has its own unique ID.

System Id	* Type	* Number	* Item Name	Description	Commodity	Delete	Item ID	ERP System ID	LinkedItemId	Price	* Quantity	* UOM.Quantity	Extended Price	Savings
Help And Options. Click on the + sign on the left for more information to fill out the cells														
Terms Help And Options. Click on the + sign on the left for more information to fill out the terms cells														
5300	Basket Lot	2.0	Prepack renamed							N/A	N/A		Fx	N/A
5401	Line Item	2.1	L1						5301	10	12	EA	Fx	Fx
5404	Basket Lot	3.0	Prepack 2							N/A	N/A		Fx	N/A
5405	Line Item	3.1	L1						5301	10	10	EA	Fx	Fx
5301	Line Item	4.0	L1							10	5	EA	Fx	Fx

Related Information

[Linking Items to a Basket Lot in Guided Sourcing [page 385]]
[Configuring a Sourcing Event Template for Basket Lots with Linked Items]

Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events

Use the **Questions, requirements, and attachments** panel to add and edit questions, prerequisites, requirements, and attachments to your event.

- **Questions** show suppliers (participants) a text prompt you specify. You also specify the type of response you accept, such as text or date. You can optionally specify a range of acceptable responses, or a list of responses presented to suppliers in a dropdown.

  > ⓘ Note
  >
  > Enable the **Allow to display full text of a question in guided sourcing events** (`Application.AQS.GuidedSourcing.EnableDisplayFullText`) parameter to display the full text of a question in a guided sourcing event. For more information see, Allow to display full text of a question in guided sourcing events.

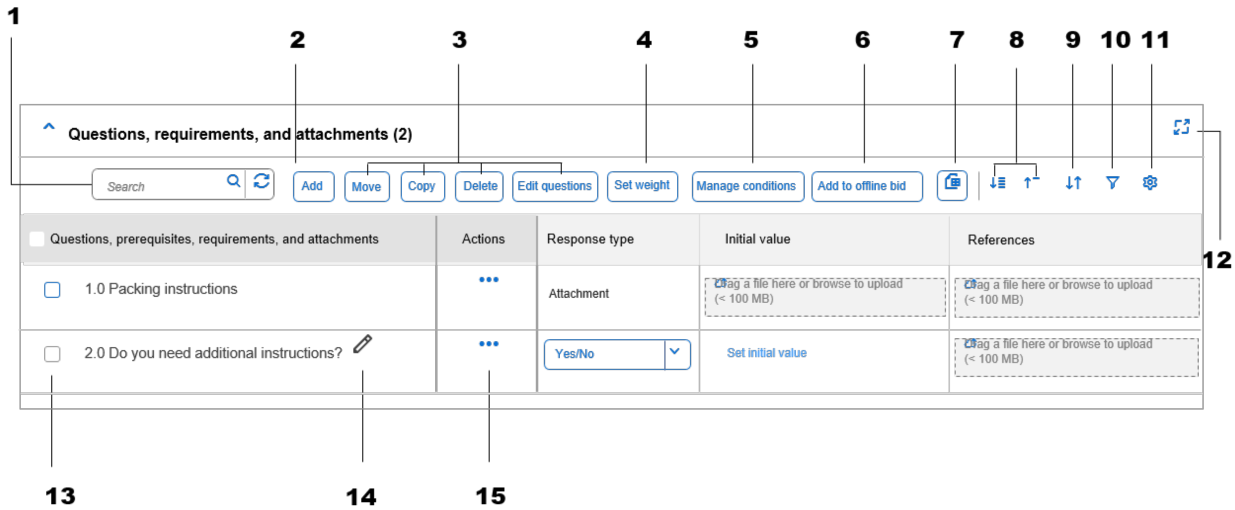
- **Prerequisites** are questions that you require suppliers to respond to before they can view event content or submit responses. You can also require responses to be approved by an event owner.
- **Requirements** are statements you can add to the event to communicate information about your expectations. 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.
- **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 collect responses in many formats, including text, numbers (integers), decimal numbers, percentage, quantity, money values, Boolean values, dates, and addresses. Text can be **Short answer** (a single line, up to 255 characters) or **Long answer** (multiple lines of text, up to 100,000 characters).

When adding questions and requirements, you can import them from an Excel document, or add them individually using the interactive interface. When adding prequisites or attachments, you must add them individually using the interactive interface.

You can also create conditional content that enables you to display or hide questions, requirements, sections, and attachments based on the participants' answers to specific questions. For more information about adding conditional content in questions, requirements, sections, and attachments, see Adding Conditional Content in Questions, Requirements, and Attachments [page 399].

The **Questions, requirements, and attachments** panel shows these content items in a table format:



The **Questions, requirements, and attachments** panel includes the following elements:

1. Search box. Searches entries in the table using a simple, exact-match search that ignores case.
2. **Add**: Add sections, questions, requirements, or attachments.
3. Item-specific buttons, which are only available if you have selected content items in the table.
   - **Move** and **Copy** button: Move or copy selected content items.
   - **Delete** button. Delete selected content items.
   - **Edit questions**: Edit response type and rules for all selected questions.

   The **Move**, **Copy**, **Delete**, and **Edit questions** buttons are disabled in the draft state for unauthorized users when **Restricted Question** is set to **Yes**. For more information, refer to Restricted Question.
4. **Set weight**: Set weights for responses. This button is present only in events that are enabled for grading and scoring (the **Enable scoring on participant responses** event rule is enabled) and that contain questions with responses that can be graded.
   Search box. Searches all names (the text displayed as the question) with a simple, exact-match search that ignores case.
5. **Manage conditions**: Create and manage content conditions that enable you to show or hide content items based on supplier inputs to certain questions.
6. **Add to offline bid**: Configure questions to receive bid responses from custom offline response sheets. This button is available if you have selected content items in the table.
7. Excel icon. Import questions and requirements from an Excel document.
8. Icons to expand all or collapse all table entries.
9. Sort icon. You can sort entries by **Questions, prerequisites, requirements, and attachments** column (name) text.
10. Filter icon. You can filter entries by **Questions, prerequisites, requirements, and attachments**, **Response type**, **Required answer**, and **References** field values.
    Filters are reset to their default values when you reopen the table and do not affect what is visible to suppliers. To filter by **References** field values, select **Yes** (matches entries with 1 or more reference files) or **No** (matches entries with no reference files). To filter by the **Questions, prerequisites, requirements, and attachments**, **Response type**, and **Required answer** field values, enter text to match. As with other text-based filters, letter case is ignored, there are no wildcard characters, and all characters are matched literally (quote marks and asterisks have no special meaning).

11. Settings icon. You can show or hide columns or change column order. See Showing, Hiding, Freezing, and Moving Table Columns [page 390] for more information.
12. Expand icon. Expands the table to the full page.
13. Checkbox to select a content item.
14. Edit icon for a content item name (question text). Only visible when you hover next to the item name.
15. More actions icon for a content item. Opens a menu with options to add additional content after the item, edit the item, use the messaging application to send a message about the item, or delete the item.

> ⓘ Note
>
> The **Edit question** option is unavailable in the draft state for unauthorized users when **Restricted Question** is set to **Yes**. For more information, refer to Restricted Question.

Showing, Hiding, Freezing, and Moving Table Columns

- **Showing and Hiding columns**
  To show or hide columns in a table, select the settings icon (⚙) in the upper-right corner of the table. Use the popup to choose columns to show or hide
- **Freezing Column Positions**
  Freezing a column locks its position when you scroll horizontally; it also locks the position of all columns to the left of the frozen column. Frozen columns cannot be resized
  To freeze a column, click the more options icon (•••) in the column header and select **Freeze**. If a column header doesn't have a more options icon, click the column header and select **Freeze**
  Note that you can only freeze columns shown in the initial table view. To freeze columns that require horizontal scrolling to view, expand your window or reorganize your table columns.
- **Moving Column Positions**
  To move a column to the left or right:
  1. Unfreeze any frozen table columns by clicking the more options icon (•••) in the column header (or the column header, if there's no more icon) and selecting **Unfreeze**.
  2. Select the settings icon (⚙) in the upper-right corner of the table to open a popup with column names.
  3. Deselect all columns, then select a single column to move.
  4. Use arrows (^ , ˅) to move the column up (to the left) or down (to the right). Use double arrows (⌃⌃ , ⌄⌄) to move the column to the top (leftmost position) or the bottom (rightmost position).
  5. Reselect the columns you want to show.

  In the the **Questions, prerequisites, requirements, and attachments** table, column order is not persistent and column order is reset to the default order each time you open the event page.

  Adding Questions and Prerequisites to Guided Sourcing Events [page 391]

  Viewing and Adding Intelligent Recommendations for Questions in Guided Sourcing [page 395]

  Adding Requirements and Attachments to Guided Sourcing Events [page 397]

  Adding Conditional Content in Questions, Requirements, and Attachments [page 399]

  Managing Conditions from the Manage Conditions Popup [page 400]

  Creating a Content Condition in Guided Sourcing [page 402]

  Adding or Removing a Content Condition [page 405]

Related Information

Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568]

Adding Questions and Prerequisites to Guided Sourcing Events

This procedure demonstrates how to use questions and prerequisites to solicit information from suppliers (participants). Prerequisites are questions that suppliers must answer before seeing event contents or submitting responses.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

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. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Questions, requirements, and attachments** panel and click **Add** > **Question**.
   A popup opens for the question.
3. In the **Name** field, enter the text for your question.
   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."
4. Select the type of response you want the supplier to provide (such as **Text** > **Short answer**).
5. **Optional:** Configure an initial value and any attachments.
   If the **Response type** is **Attachment**, you use the **Initial value** to upload a file for participants to complete, such as an Excel file.

   > Note
   >
   > You can drag and drop attachments from message popups into questions. For questions that have **Response type** set to **Attachments**, drag and drop the file you want to add as attachment into the **Initial value** section of the **Add** dialog box. Alternatively, you can drag and drop the files that you want to attach into the **References** column of the question to which you want to add the attachment.
   >
   > You can add only one attachment to the initial value. If you drag and drop another file to the **Initial value** section of a question that contains a file attachment in the initial value, you are asked to confirm whether you want to replace the existing attachment with the new one. Click **Yes** to replace; **No** to cancel. In the **References** column, you can add as many files as long as the total file size for the entry does not exceed 100 MB.
   >
   > For more information, see About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568].
6. Depending on the answer type, enter specifications for acceptable answers.
   Numeric answer types (**Money**, **Number**, **Decimal**, **Quantity**, **Percentage**, and **Date**) allow you to specify a range for an acceptable value. The answer types **Text**, **Money**, **Number**, **Decimal**, **Percentage**, and **Date** allow you to create a dropdown with values for suppliers to choose from.
   To create a dropdown with choices for suppliers:
   a. Select the number of responses the supplier can choose: **Single choice** or **Multiple choices**.
   b. In the box below **Single choice** or **Multiple choices**, enter the first choice for the dropdown. Click the plus sign (⊕) to add more boxes and enter additional choices for the dropdown.
   c. To configure a default value for a **Single choice** term, hover over the left column, then click the selection box that appears. For a **Multiple choices** term, select a radio button next to one or more of the values.

In the following example, the user is selecting 90 as the default value:

7. Select a value from the **Is a response required** dropdown.

   If event participants are required to respond, keep the default value for **Is a response required**. The default value is **Yes, participants must respond**.

   If event owners are required to respond, select **Yes, an event owner must respond, participants cannot respond**.

   > ⓘ Note
   >
   > This option is also available on the page that appears when you select **See all options** to specify additional information. Based on your choice, you can choose to make a selection in this step or on the question details page.

8. Click **See all options**.
9. To create a prerequisite question, select one of the following options in the **Is this a prerequisite question** field when creating an event question:

Prerequisite Question Options	Description
No, not a prerequisite question	The question is not a prerequisite for an event content.
Yes, but do not require an answer to show event content	The question is a prerequisite, but there are no restrictions for suppliers to first answer the question.
Yes, require an answer to show event content	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.

Prerequisite Question Options	Description
Yes, require an answer before participants can submit bids or respond to questions	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.

10. If this is a prerequisite question, you can require the event owner to review the response for the prerequisite to be satisfied by selecting **Yes** in the **Owner must review prerequisite response?** field.
11. For prerequisite questions, configure items, terms, and attachments or objects that are hidden until prerequisites are satisfied.
    a. Open the item or term for editing.
    b. In the **Can participants see this item?** or **Can participants see this term?** field, select **Yes, only after participants answer the prerequisite questions**. (If you don't see these fields for the item or term, click **View all options**.)
12. **Optional:** To create an internal-use question visible to event owners only, set the option **Is a response required?** to **Yes, an event owner must respond - participants cannot respond** or **No, but an event owner can optionally respond - participants cannot respond**
13. **Optional**: To view the supplier records in the **Add question** and **Edit question** pages of the **Questions, requirements, and attachments** table, slide the toggle for **Set participant-specific initial value** to *On*.

    You can use the toolbar in the table with participant-specific values to sort and filter entries:

To perform this action	Select this icon
Sort entries.	↓↑
Create one or more filtering statements that include or exclude entries based on column values.	When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Choose columns to show or hide.	

14. **Optional:** Select one of the following options for the **Team Access Control** to set access control for various content elements. If you do not set any access control for content elements, they can be viewed by anyone who has access to the guided sourcing event. Event owners can see all content elements.

    Options:

    - **Legal Information**
    - **Owner/Administrator Only**
    - **Private to Team Members**
    - **Classified**
    - **Finance Information**

Results

The question is added to the event and you are redirected to the **Questions, requirements, and attachments** panel where the question is shown listed in a table.

> ⓘ Note
>
> If you want to modify the response-required criterion for any question in the table, you can quickly do so by selecting a value from the **Required Answer** column.

Task overview: Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]

Related Information

Viewing and Adding Intelligent Recommendations for Questions in Guided Sourcing [page 395]
Adding Requirements and Attachments to Guided Sourcing Events [page 397]
Adding Conditional Content in Questions, Requirements, and Attachments [page 399]
Managing Conditions from the Manage Conditions Popup [page 400]
Creating a Content Condition in Guided Sourcing [page 402]
Adding or Removing a Content Condition [page 405]
Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]
Adding Requirements and Attachments to Guided Sourcing Events [page 397]
Importing Guided Sourcing Questions and Requirements with the Simplified Excel Import Feature [page 319]
Dragging and Dropping Attachments into a Guided Sourcing Event [page 569]
Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]

Viewing and Adding Intelligent Recommendations for Questions in Guided Sourcing

Use this procedure to view recommended questions for a guided sourcing event. SAP Ariba recommends questions to include in a guided sourcing event based on event, item, commodity, region, department, and supplier data in the current event and similar past events, and on questions you asked in similar past events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The training data must include some event names and questions. To get a recommendation, the user must fill in the **Event name** field.

- In the intelligent configuration manager for SAP Ariba solutions, set the parameter **Enable content recommendations in guided sourcing events** (`Application.AQS.GuidedSourcing.ContentRecommendation.Enabled`) to **Yes**. The default for this parameter is **No**. See Accessing Intelligent Configuration Manager Workspace.
- Train the machine learning model. See Manually Training the Content Recommendation Machine Learning Model and Configuring Automatic Training of the Content Recommendation Machine Learning Model.

Context

SAP Ariba Sourcing recommends questions to include in a guided sourcing event based on event, item, and supplier data in the current event and similar past events, and on questions you asked in similar past events.

Information used to generate the recommendation includes item name; event name; department; commodity and region, both at the event and item level; and suppliers added to the current event. After you train the machine learning model, the recommendation is also based on information from similar past events, including event, item, and supplier information, and questions you asked in similar past events.

For all fields except **Question** and **Event name**, if the data used to train the machine learning model mostly includes values for these fields, they are used in the recommendation. However, if these fields are mostly empty in the training data, they aren't used in the recommendation.

If you've retrained the machine learning model, data used to make the recommendation also includes past experience with the model. For example, if the model recommends 10 questions and the user chooses only six of them, then the next time you retrain the machine learning model, this information is used to refine the model.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.

If SAP Ariba Sourcing has recommended content for the event, a band appears at the top of the **Questions, requirements, and attachments** panel, stating **We have content recommendations**.

2. In the band, click **Add content from recommendations**.
   The **Add recommended content** panel appears, showing the list of recommended questions and the number of previous events that contained these questions.

   > ⓘ Note
   >
   > To hide the content recommendations, click × on the right side of the band.

3. From the **Add recommended content** panel, click the checkboxes next to the questions you want to add. Then, click **Add** at the bottom of the panel.

   When you add a question, the question's response type, initial value, and attachments, if any, are automatically added.

   To deselect a question after you've selected it, uncheck the checkbox next to the question. To select all questions, click the checkbox next to **Questions** in the **Add recommended content** panel.

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Adding Requirements and Attachments to Guided Sourcing Events

This procedure demonstrates how to use requirements to provide information to suppliers (participants) about what you require. Attachments can be configured so that suppliers download a document, edit or complete the document, then submit the document back to the event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

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.

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.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Go to the **Questions, requirements, and attachments** panel and click **Add** > **Attachment** or **Add** > **Requirement**.
   A popup opens for the attachment or requirement.

   > ⓘ Note
   >
   > Alternatively, you can drag and drop a file from the message popup to add that to the requirement or attachment.
   >
   > For more information, see About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568].

3. In the **Name** field, enter text to display to the supplier.
4. **Optional:** Upload a reference document.
   Suppliers can download reference documents but cannot submit them.
5. **Optional:** Select one of the following options for the **Team Access Control** to set access control for various content elements. If you do not set any access control for content elements, they can be viewed by anyone who has access to the guided sourcing event. Event owners can see all content elements.

   Options:
   - **Legal Information**
   - **Owner/Administrator Only**
   - **Private to Team Members**
   - **Classified**
   - **Finance Information**
6. Select an option for **Can participants see this item?**
   Options:
   - **Yes** (the default): The item is always visible to participants.
   - **Yes, only after participants answer the prerequisite questions**: Participants only see the item after they submit responses to questions with the option **Yes, require an answer to show event content**, as described in Adding Questions and Prerequisites to Guided Sourcing Events [page 391].

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Related Information

Adding Questions and Prerequisites to Guided Sourcing Events [page 391]
Viewing and Adding Intelligent Recommendations for Questions in Guided Sourcing [page 395]
Adding Conditional Content in Questions, Requirements, and Attachments [page 399]
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Adding Conditional Content in Questions, Requirements, and Attachments

You can create conditional content in guided sourcing events. Support for conditional content enables you to display or hide questions, requirements, sections, and attachments based on the participants' answers to specific questions.

You can define the conditions at the event level or at the template level. The conditions applied from the template can be edited or deleted at the event level.

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 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. SAP Ariba displays a message when suppliers export an event with conditional content, alerting them that certain questions may be omitted from the exported content due to visibility conditions.

Restrictions

- Questions that have the following types of answers are not supported for creating conditions:
  - Long answer
  - Address
  - Attachment
  - Product questionnaire
  - Factory
- 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.
- Guided sourcing does not support conditional questions that contain the expression `none of`. If a template contains a condition that uses the `none of` expression, publishing of that template fails.

- Visibility conditions cannot be applied to line items, lots, or sections that contain line items or lots.
- If you import event content by using Excel files (including simplified Excel and smart imports), all the content conditions in the event are deleted.
- It is not possible to select currencies for conditions matched to **Money** type fields.
- 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-stage events.

Parent topic: Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]

Related Information

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Managing Conditions from the Manage Conditions Popup

Use this procedure to perform various tasks associated with content conditions from the **Manage conditions** popup.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

The **Manage conditions** popup displays the list of conditions available in an event and enables you to perform various tasks such as create conditions, edit conditions, delete conditions, copy conditions, and apply conditions to content items. **Manage conditions** popup also provides an option to view the expression associated with a condition.

Procedure

1. Click the **Manage conditions** button in the **Questions, requirements, and attachments** section of a guided sourcing event page.

   The **Manage conditions** popup appears.
2. You can perform the following tasks from the **Manage conditions** popup.

Task	Description
View list of conditions	The **Manage conditions** popup displays the list of conditions available in the event. The list contains conditions created in the event and conditions defined in the template used for the event. You can also see whether the condition is applied to any content item.
View expression	The **Show expression** link in the **Manage conditions** popup enables you to view the expression associated with a condition.
Create a condition	The **Create new** button enables you create a new condition. For more information, see Creating a Content Condition in Guided Sourcing [page 402].
Edit condition	The *edit* (pencil) icon enables you to edit a condition. Click the pencil icon to open the **Edit condition** popup, from which you can edit the name, description, and expression associated with a condition. The edits you make to a condition apply to any content item to which the condition is applied. For more information about editing an expression, see Defining or Editing an Expression for a Condition [page 404].
Delete a condition	The *delete* icon enables you to delete a condition from the event. When you delete a condition, the condition is deleted from the event and removed from the content items to which the condition was applied. When you click *delete*, a confirmation message **Delete the condition** appears. Click **Delete** to confirm deletion.
Copy a condition	The *duplicate* icon enables you to create a copy of a condition. You can use this option if you want to create a condition similar to an existing condition, especially if the condition involves a complex expression. It is mandatory that you change the name of the condition when you create a duplicate condition. You can also edit the description and expression associated with the condition. ⓘ Note When you copy a condition, the content associations for the condition are not copied. The duplicate condition that you created by copying is created as a new condition and you need add the condition to content items as necessary. For more information about editing an expression, see Defining or Editing an Expression for a Condition [page 404].

Task	Description
Apply a condition to one or more content items	The **Add to contents** button enables you to apply a condition to one or more content items. To apply a condition to a content item: 1. Select the condition that you want to apply to content items and click **Add to contents**. The **Add condition** *`condition name`***to contents** popup lists the content items to which you can apply the condition. 2. From the **Add condition** *`condition name`* **to contents**, select the content items to which you want to apply the selected condition, and click **Add**.

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Creating a Content Condition in Guided Sourcing

Use this procedure to create content conditions that enable you to show or hide content items based on supplier inputs to certain questions.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

The **Create new** button in the **Manage conditions** popup enables you create new content conditions.

> ⓘ Note
>
> - Money questions, by default, use the event currency. Similarly, unit of measure (UoM) questions use the UoM specified at the question. You cannot modify these values from the create condition page.

- Conditions are automatically deleted when:
  - the data type of a question that is used in the condition is changed.
  - the question used in the condition is deleted.
- You cannot create a condition based on a single- or multi-choice question that does not have a default value specified.
- Expressions are not checked for conflict and the user defining the condition must ensure that there are no conflicting expressions in a condition.

Procedure

1. Click the **Manage conditions** button in the **Questions, requirements, and attachments** section of a guided sourcing event page.

   The **Manage conditions** popup appears.
2. Click **Create new**.

   The **Create new condition** popup appears.
3. In the **Condition name** field, enter a name for the condition.
4. (Optional) In the **Description** field, enter a description for the condition.
5. Add the expression for the condition. You can select one or more questions and specify the validation criteria by using a number of operators. See Defining or Editing an Expression for a Condition [page 404] for more information about the expression builder capabilities and supported operators.

   → Tip

   Use the horizontal and vertical scroll bars to scroll the content and to view and configure the expressions.
6. Click **Create**.

Task overview: Questions, Prerequisites, Requirements, and Attachments in Guided Sourcing Events [page 388]

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Defining or Editing an Expression for a Condition

Expressions form the operative part of a condition. You can build an all-new expression or edit an expression from a condition that is available in the event.

Expressions in guided sourcing support multiple levels of parallel and nested statements. Even though you cannot add a new row or group parallel to the root level, you can create a group before the root element. If you create a new group before the root element, the newly-created group becomes the root element and the original root element moves one level down in the hierarchy of the expression.

You can define an expression based on the following guidelines:

- You can choose an **AND** or an **OR** operator at the root level of the expression and to define groups within an expression.
- You can add a row within a group.
- You can convert rows into a group.
- You can add a group to a row.
- You can have more than one groups at the same level.
- You can add a row or group before or after the selected group or row.
- You can create duplicate groups.
- You can delete rows and groups except the one at the root level.

To create a new expression:

1. From the **Expression** section of the **Create new condition** popup, select the root element: **AND** or **OR**.
2. From the dropdown that contains a list of questions available for creating conditions, select the question based on which you want to create a condition.
   Based on the answer type for the question you selected, operators are displayed. For example, if the question you selected has Boolean answers, option buttons **Yes** and **No** are displayed.
3. If you want to add more questions to the expression, click any of the following:
   - **Create new row** to create a row parallel to the first row.
   - **Create new group** to create a group inside the selected row.
4. Select the questions at the newly-created row or group, and specify the operators and values as appropriate. Groups are created based on the operators **AND** or **OR**. For other statements, you can use any of the operators listed in Supported Operators [page 405].
5. Optionally, create additional groups or rows and select questions and operators and specify the values.
   - You can select any of the following options at the group level:
     - **Create new row inside**
     - **Create new group inside**
     - **Create new group before**
   - Alternatively, you can click **Duplicate group** to create a duplicate of the selected group and edit the statements as required.

   > → Tip
   >
   > Use the horizontal and vertical scroll bars to scroll the content and to view and configure the expressions.

6. Click **Create**.

Supported Operators

You can form expressions based on the following operators.

The following operators are supported for both numerical and string values:

- **Is equal to**
- **Is not equal to**

The following operators are supported only for string values:

- **Contains**
- **Does not contain**

The following operators are supported only for numerical values:

- **Is greater than or equal to**
- **Is greater than**
- **Is lesser than or equal to**
- **Is lesser than**
- **between**
- **not between**

Adding or Removing a Content Condition

From a guided sourcing event page, you can use this procedure to add a condition to a content item and also, remove a condition from the content item to which it was applied.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

When you add a condition to a content item, you apply the condition to the selected content item. You can apply the same condition to more than one content items. However, you cannot add more than one condition to a content item. If you add a condition to a content item that has a condition applied to it, the previously-added condition is removed from the content item and the new condition is applied.

In the **Contents** table, a *branch* icon is added to the content items to which conditions are applied. You can click the icon to view the expressions associated with the condition applied to the item.

When you remove a condition from a content item, you remove the association between the condition and the selected content item. The condition is not deleted from the event. The condition continues to apply on any other content item to which it was added.

> **Note**
>
> - If you create an event by copying contents from another event that has conditions attached to the content, the conditions are also copied to the new event.

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Applying a Condition to a Content Item in a Guided Sourcing Event

Use this procedure to apply a condition to a content item in a guided sourcing event.

Procedure

1. From the **Questions, requirements, and attachments** section of the guided sourcing event page, click the more icon next to the content item to which you want to apply a condition and click **Add condition**.

   The **Add condition to** *`content item`* popup displays the conditions available for applying to the selected content item. Alternatively, you can click the **Create new** button to create a new condition as explained in Creating a Content Condition in Guided Sourcing [page 402].
2. Select the condition that you want to apply to the content item and click **Add**.

   A confirmation message states that the selected condition is added to the content item.

Removing a Condition from a Content Item

Use this procedure to remove a condition from a content item.

Procedure

1. From the **Questions, requirements, and attachments** section of the guided sourcing event page, click the more icon next to the content item to which you want to apply a condition and click **Remove condition**.

   The **Remove the condition from this content?** confirmation message appears..
2. Click **Remove**.

   A confirmation message states that the condition is removed from the content item.

Additional Bidding Formats and Options for Guided Sourcing Events

Guided sourcing supports alternate methods for you to handle bids and responses and for participants (suppliers) to submit bids.

Guided sourcing supports the following additional bidding formats and options:

- Multi-currency events: In multi-currency events, buyers allow suppliers (participants) to select currencies to use in bids, which can be different than the currency for the event. and can choose whether to share current exchange rates with suppliers.
- Sealed bidding: Sealed bidding enables buyers to see supplier participation status and log activities but prevent buyers from seeing incoming bids.
- Envelope bidding: Envelope bidding enables buyers to enclose the content of their guided sourcing events in different envelopes, which conceal participant responses. Envelopes are opened in sequence, and you can configure different users to open each envelope. This enables buyers to have an unbiased evaluation of participant responses.
- Alternative bidding: Alternative bidding gives suppliers (participants) the ability to submit alternate bids after they have submitted a primary bid based on a guided sourcing event as you have defined it. You can then view the primary and alternative pricing responses and decide what meets your needs the best.
- Email bidding: Email bidding enables buyers to allow suppliers email their bid sheets as Microsoft Excel file attachments.
- Custom offline response sheets: Custom offline response sheets enable you to create and import your own customized version of an offline bid sheet for guided sourcing events.
- Multi-round bidding: Multi-round bidding enables you to refine pricing and other information by creating additional bidding rounds in a single event.
  SAP Ariba also supports multi-stage projects [page 131], which enable you to link together multiple events as predecessor and follow-on events. When you create a follow-on event, you can choose to copy supplier, item, and bid information from the predecessor event.
- Supplier-added items: You can create guided sourcing events that allow suppliers to add items and lots to primary and alternative bids.

Multi-Currency Guided Sourcing Events [page 409]

Sealed Bidding in Guided Sourcing Events [page 410]

Envelope Bidding in Guided Sourcing Events [page 414]

Alternative Bidding in Guided Sourcing Events [page 432]

Email Bidding in Guided Sourcing Events [page 445]

Configuring Column and Row Formats for Standard Offline Response Spreadsheets in Guided Sourcing [page 446]

Custom Offline Response Sheets in Guided Sourcing Events [page 447]

Working with Multi-Round Bidding Events in Guided Sourcing [page 456]

Supplier-Added Items in Guided Sourcing Events [page 467]

Multi-Currency Guided Sourcing Events

In multi-currency events, buyers allow suppliers (participants) to select currencies to use in bids, which can be different than the currency for the event. and can choose whether to share current exchange rates with suppliers.

Multi-currency events are configured by setting the event rule **Allow participants to select bidding currency** to **Yes**. In multi-currency events, the template author or event owner also configures the following items in the event rules:

- The currency exchange rate set for the event. Currency exchange rate sets (also referred to as currency conversion rate sets) are defined by administrators using the Ariba Administrator, as described in the *Common data import and administration guide for SAP Ariba Strategic Sourcing and Supplier Management solutions*.
- The event rule **Show currency exchange rates to participants**, which specifies if currency exchange rates are visible suppliers.

In multiple-currency events, suppliers choose the bidding currency when they select the lots and line items they will bid on. Suppliers can also choose one bidding currency for all items or choose a different bidding currency for each item.

> **Note**
>
> In sourcing events, it is not possible to choose different currencies for different items within the same lot. Only one currency can be chosen per lot. To choose a different currency for each item, the items must be listed as separate line items.

In a multi-currency event, you can click the currency icon ( ) in the upper-right corner of the item table and choose to show money terms in either the event currency or a bidding currency.

While setting the initial price in a multi-currency guided sourcing event, buyers can select a bidding currency, which is different from the event currency. Also, buyers can select different bidding currencies for each of the participants.

When participants place bids in a currency that is different from the event currency, the system does the following actions to notify the buyer users that the bid is submitted in a currency different from the event currency:

- Sends an email to the buyer users
- Adds an event audit log entry
- Displays an event message

For more information about multi-currency events, see About international events in the *Event management guide*.

Set Exchange Rate in Guided Sourcing

You can set the exchange rate for bidding currency from the **Items that need quotes** panel of a guided sourcing event in the draft state. If you've enabled the **Allow participants to select bidding currency** rule in the guided sourcing event template and the exchange rate for bidding currency is not specified, then you can set the exchange rate by using one of the following options:

- Use the clickable link, **Set exchange rate**, that appears for the bidding currency term in the items table. Selecting the link directs you to the **Set event rules** page where you can set the exchange rate.

> ⓘ Note
>
> The **Set exchange rate** link will only be visible in the items table if the exchange rate is not specified in the **Set event rules** page.

- Use the **Edit terms** button in the **Items that needs quotes** panel to bulk-edit the exchange rate for bidding currency. In the **Mass edit** popup that appears, when you select the bidding currency term in the **Term attributes** tab, a **Set exchange rate** link is displayed. Selecting the link directs you to the **Set event rules** page, where you can set the exchange rate.

  > ⓘ Note
  >
  > The **Set exchange rate** link will only be visible in the **Mass edit** > **Term attributes** tab if you have not specified the exchange rate in the **Set event rules** page.

Sealed Bidding in Guided Sourcing Events

Sealed bidding enables buyers to see supplier participation status and log activities but prevent buyers from seeing incoming bids.

Creating Sealed Bid Events in Guided Sourcing [page 410]

Revealing Sealed Bids for Guided Sourcing Events [page 412]

Extending Event Time for Sealed Bid Events in Guided Sourcing [page 413]

Creating Sealed Bid Events in Guided Sourcing [page 410]

Revealing Sealed Bids for Guided Sourcing Events [page 412]

Extending Event Time for Sealed Bid Events in Guided Sourcing [page 413]

Creating Sealed Bid Events in Guided Sourcing

Use this procedure to create sealed bid events. You can see supplier participation status and log activities but not incoming bids in open guided sourcing events by enabling sealed bidding.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.
- You must create an RFP or auction from a guided sourcing template with the event rule **Can owner see responses before event closes** set to **No** or delegated.

Procedure

1. Open the event in which you want to enable sealed bidding.
2. On the guided sourcing event page, click the more actions icon (···) in the upper-right corner and select **Event settings** > **Set event rules**.
3. On the **Set event rules** page, enable the following options under the event rule **Allow owner to see the following information before event closes** based on your needs:
   - **Log entries when suppliers access and exit events**
   - **Log entries when suppliers download attachments**
   - **Log entries when suppliers submit responses**
   - **Participation status on the Supplier tab**

   > Note
   >
   > You must set the event rule **Can owner see responses before event closes** to **No** to make the event rule **Allow owner to see the following information before event closes** and all of its options available on the **Set event rules** page. If you cannot see the event rule **Allow owner to see the following information before event closes** on the **Set event rules** page in an event, contact a member in the Template Creator group to delegate this rule in the event template.
4. Save the changes and publish the event.

   The event moves to the **Monitor** state.

Next Steps

Click the more actions icon (···) in the upper-right corner of the event page and choose **View audit logs**:

- View specific log entries under the **Log** tab.
- View supplier participation status under the **Suppliers** tab.

Task overview: Sealed Bidding in Guided Sourcing Events [page 410]

Related Information

Revealing Sealed Bids for Guided Sourcing Events [page 412]
Extending Event Time for Sealed Bid Events in Guided Sourcing [page 413]
Creating a Guided Sourcing Project or Event from a Template [page 80]

Revealing Sealed Bids for Guided Sourcing Events

Use this procedure to reveal bids when a sealed bid event reaches the review responses phase.

Prerequisites

- The event must be created from a template with the following Market Feedback rule settings:
  - **Show participant responses to other participants**: **No**
  - **Show lead bid to all participants**: **No**
  - **Can owner see responses before event closes**: **No**
  - **Can users extend bid time or reveal bids in sealed-bid events**: **Yes**
- You must be a member of a project group with:
  - The **Manage Sealed Bids** role
  - The **Can owner edit this Project Group** rule set to **No**
- You must be a member of the following global groups:
  - Category Buyer
  - Event Administrator
- The guided sourcing event must be in the review responses state.

Context

When the **Can users extend bid time or reveal bids in sealed-bid events** rule is enabled in the guided sourcing event template, the supplier bids are not revealed automatically when the event reaches review responses phase. You can choose to reveal bids when a sealed bid event reaches the review responses phase. If you want to reveal bids manually by using the Event Mangement API, refer to Revealing Sealed Bids with the Event Management API.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event that is in Review Responses stage based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon (🔍).
4. Click the *event ID* link to open the guided sourcing event.
5. Click the **Reveal bids** button in the upper-right corner of the event page.

   The **Reveal bids** popup is displayed.
6. Click **Reveal bids** to reveal the sealed bid content.

   The sealed bid details are displyed in the **Award allocation** panel and the **Best Bid award allocation** panel.

Task overview: Sealed Bidding in Guided Sourcing Events [page 410]

Related Information

Creating Sealed Bid Events in Guided Sourcing [page 410]
Extending Event Time for Sealed Bid Events in Guided Sourcing [page 413]

Extending Event Time for Sealed Bid Events in Guided Sourcing

Use this procedure to extend the event end time when a sealed bid event reaches the review responses phase.

Prerequisites

- The event must be created from a template with the following Market Feedback rule settings:
  - **Show participant responses to other participants**: **No**
  - **Show lead bid to all participants**: **No**
  - **Can owner see responses before event closes**: **No**
  - **Can users extend bid time or reveal bids in sealed-bid events**: **Yes**
- You must be a member of a project group with:
  - The **Manage Sealed Bids** role
  - The **Can owner edit this Project Group** rule set to **No**
- You must be a member of the following global groups:
  - Category Buyer
  - Event Administrator
- The guided sourcing event must be in the review responses state.

Context

When the **Can users extend bid time or reveal bids in sealed-bid events** rule is enabled in the guided sourcing event template, the supplier bids are not revealed automatically when the event reaches review responses phase. You can choose between revealing bids and extending event duration when a sealed bid event reaches the review responses phase. If you want to extend the event duration manually by using the Event Mangement API, refer to Extending Event Time for Sealed Bid Events with the Event Management API.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event that is in Review Responses stage based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the *More* menu ( ) in the upper-right corner of the event page and then, click the **Event options** **Reopen event**.

   The **Edit event** dialog box is displayed.
6. Select the date and time when you want the event to end.
7. Click **Update** to update the event end time, or click **Cancel** to return to the previous page without reopening the event.

Task overview: Sealed Bidding in Guided Sourcing Events [page 410]

Related Information

Creating Sealed Bid Events in Guided Sourcing [page 410]
Revealing Sealed Bids for Guided Sourcing Events [page 412]

Envelope Bidding in Guided Sourcing Events

Envelope bidding enables buyers to enclose the content of their guided sourcing events in different envelopes, which conceal participant responses. Envelopes are opened in sequence, and you can configure different users to open each envelope. This enables buyers to have an unbiased evaluation of participant responses.

About Envelope Bidding in Guided Sourcing Events

Envelope bidding enables buyers to enclose the content of their guided sourcing events in different envelopes, which conceal participant responses. Envelopes are opened in sequence, and you can configure different users to open each envelope. This enables buyers to have an unbiased evaluation of participant responses.

Specifically, envelope provides the following features in guided sourcing:

- Ability to Enclose Event Content in Different Envelopes [page 416]
  The content of guided sourcing events can be assigned to different envelopes. Participant responses are not visible until the envelopes are opened.
  To use this functionality, the event rule **Number of Envelopes** must be set to an integer ranging from 1 to 9.
- Envelope Support for Item Terms in Guided Sourcing Events [page 420]
  You can enclose the terms of an event item in separate envelopes so that supplier responses to item terms are viewed only by authorized project team members.
  To use this functionality, you must set the ICM parameter **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and the event rule **Allow terms of an item to be in separate envelopes** both to **Yes**.
- Ability to Authorize Project Teams (Groups) to Open Envelopes [page 417]
  Project (or event) owners can create project groups for each envelope, include or exclude team members as needed, and authorize project groups with the ability to open envelopes.
- Team Access Control on Envelopes [page 418]
  Authorized group members can select which participants (or bids) advance to the next envelope; only responses from the selected participants (or bids) are visible in the next envelope.
  To use this functionality, the event rule **Will teams control envelope access?** must be set to **Yes**.
- Separate Envelopes for Primary and Alternative Bids [page 419]
  If alternative bidding is enabled (with the event rule **Can participants create alternative responses?** set to **Yes**), primary and alternative bids are contained in separate envelopes, enabling team members to evaluate the responses separately.
  To use this functionality, the event rule **Separate envelopes for primary and alternative bids** must be set to **Yes**.
- Ability to Recover Rejected Envelopes [page 420]
  Previously rejected envelopes can be recovered and opened during an envelope bidding event. Only users in the **Recover Rejected Envelopes** group can recover and open rejected envelopes.
  To use this functionality, the event rule **Allow rejected envelope bids to be opened** must be set to **Yes**.
- Ability to Restrict the Last Envelope in Guided Sourcing Events from Being Opened Until Consensus Grades Are Submitted for Previous Envelopes [page 421]
  You can add a restriction to the envelope opening process in guided sourcing to prevent project team members from opening the last envelope until previous envelopes are graded and consensus grades are submitted for previous envelopes.
  To use this functionality, you must:
  - Set the two ICM parameters **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) both to **Yes**.
  - Enable envelope bidding and grading and scoring.
  - Set the **Prevent opening the last envelope until consensus grades are submitted for previous envelopes** event rule to **Yes**.

> ⓘ 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.
> - If you use envelope bidding for an event, only items in opened envelopes can be awarded.
> - The **Bid Analysis** and **Bid Comparison** sections are displayed only when all envelopes are opened.

Parent topic: Envelope Bidding in Guided Sourcing Events [page 414]

Related Information

Envelope Rules for Guided Sourcing Events [page 422]
Building Envelopes in Guided Sourcing Events [page 425]
Opening Envelopes in Guided Sourcing Events [page 429]
Recovering and Opening Rejected Envelopes [page 431]

Ability to Enclose Event Content in Different Envelopes

You can enclose the content of guided sourcing events in different envelopes (for example, technical and commercial) so that participant responses to items in an envelope are not visible until the envelope is opened.

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 tell that a section is part of an envelope by looking for the envelope icon (✉) next to the section.

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 that 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.

If you use the Excel import function to import content from an Excel file in SAP Ariba standard format by selecting **SAP Ariba Standard format (items/questions/participants)** to a guided sourcing event, you can use the **Envelope** column in the **Content** sheet to specify envelopes for sections that are added to the **Questions, requirements, and attachments** panel, and use the **Envelope** column in the **Pricing** sheet to specify envelopes for sections that are added to the **Items that need quotes** panel.

If the event rule **Allow suppliers to add items** is set to **Yes** and the items added by suppliers don't belong to any section that has an envelope assigned, supplier responses to these items are not included in an envelope and thus are visible to all project team members.

In addition to guided sourcing single-event and full projects, you can use envelopes in competitive events, for example, auctions. To use envelope bidding in competitive events, the ICM parameter **Enable envelope for competitive event** (`Application.AQS.RFX.EnableEnvelopeForCompetitiveEvent`) must be set to **Yes**.

Ability to Authorize Project Teams (Groups) to Open Envelopes

You can create project groups for each envelope, include or exclude team members as needed, and authorize project groups with the ability to open envelopes.

If the event rule **Send notification to envelope openers** is set to **Yes**, project group members who are authorized to open an envelope receive a notification email when an envelope is ready to be opened. Event owners and active observers receive a notification email when envelopes have been opened.

Authorizing Project Teams to Open Envelopes

Use this procedure to authorize project teams to open envelopes.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

You can authorize project teams (groups) to open envelopes by setting the envelope rule **Authorize Teams to Open Envelopes** in a guided sourcing template or on the **Set event rules** page of a guided sourcing event. The following procedure describes how to authorize project teams to open envelopes from the **Set event rules** page of a guided sourcing event. For details about how to authorize project teams to open envelopes from a guided sourcing template, refer to Set Envelope Rules in a Guided Sourcing Template [page 426].

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. In the header of the project, click the **Team** icon ( ) next to the name of the event.
3. In the **Team** popup, click **Create group**.

   You can edit an existing project group instead by clicking the edit icon of the group ( ).

To remove a project group, click the delete icon of the group ( ).

4. In the **Create group** popup, enter a name for the group, assign group roles, and choose one or more group members.
5. Click **Create**.
6. In the upper-right corner of the event page, click the more actions icon () and choose **Set event rules**. If the event is already published, you must first open the event for editing by clicking the more actions icon () and choosing **Edit event**.
7. Scroll down to the **Envelope rules** section, and specify the number of envelopes you want to create.

> Note
>
> **Authorize Teams to Open Envelopes** appears when you specify one or more envelopes for **Number of Envelopes**.

8. Under the **Authorize Teams to Open Envelopes** rule, select a project team for each envelope. Members of the project team you select here are 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.
9. Configure other envelope rules as needed.

   For descriptions about envelope rules, refer to Envelope Rules for Guided Sourcing Events [page 422].

Team Access Control on Envelopes

Team access control enables project team (group) members who are authorized to open envelope bids to select which participants advance to the next envelope. Only responses from the selected participants are visible in the next envelope.

An event typically contains multiple envelopes, and the envelopes are opened sequentially. The group authorized to open the first envelope in an event sees responses from all participants, and then selects the participants who advance to the next envelope. The group authorized for the next envelope sees only responses from participants who are selected to advance from the previous envelope.

The project group's control over envelope access is controlled by the event rule **Will teams control envelope access?**. If **Will teams control envelope access?** is set to **Yes**, authorized group members first open envelopes, then select the participants who advance to the next envelope. If **Will teams control envelope access?** is set to **No**, authorized group members first select participants to advance to the next envelope, 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, it is best practice to set **Will teams control envelope access?** to **Yes**, which is the setting in the following suggested workflow. This workflow allows the authorized group to see responses **before** selecting participants to advance to the next envelope.

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 setting, the authorized group won't be able to see responses before selecting participants to advance to the next envelope.

  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, refer to Envelope Rules for Guided Sourcing Events [page 422].
- 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 **Review responses**.
- A user in the group authorized for envelope 1 opens the event and clicks **Open envelope** in the upper-right corner of the event page.
  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:
  - Clicks **Choose suppliers for next envelope** in the upper-right corner of the event page.
  - On the **Choose suppliers for next envelope** page, the user selects the suppliers (participants) to advance to the next envelope 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 are 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 advance to the next envelope.

Separate Envelopes for Primary and Alternative Bids

If alternative bidding is enabled (with the event rule **Can participants create alternative responses?** set to **Yes**),you can include primary and alternative bids in separate envelopes so that authorized team members evaluate primary and alternative responses separately.

You must set the event rule **Separate envelopes for primary and alternative bids** to **Yes** in the event template to ensure that separate envelopes are created for primary and alternative bids in the guided sourcing event.

You can view the envelopes for both primary and alternative supplier bids on the **Open envelope** and **Choose suppliers for next envelope** pages. You can choose to open either or both bids based on your requirements.

When evaluating envelopes except for the last envelope in an envelope series, you must select the primary bid of suppliers. It is OK to leave the alternative bids unselected. However, if you don't select the primary bid, guided sourcing displays an error message, instructing you to select the primary bid before you can proceed.

When evaluating the last envelope in an envelope series, you can select alternative bids with their primary bids unselected. Guided sourcing displays a warning message to inform you that the primary bid of the supplier is not selected. You can ignore this message and proceed.

Ability to Recover Rejected Envelopes

You can recover and open previously rejected envelope bids during an envelope bidding event.

The ability to control whether rejected envelope bids can be recovered and opened at a later time is controlled by the **Allow rejected envelope bids to be opened** event rule. This rule appears when **Keep the rejected envelope bids** is set to **Yes**.

Rejected envelope bids can be recovered and opened only after all envelopes in an event are opened. When a rejected envelope bid has been recovered and opened, it can no longer be rejected.

A modified envelope bidding agreement alerts suppliers that rejected envelope bids might 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.

For details about how to recover and open rejected envelope bids, refer to Recovering and Opening Rejected Envelopes [page 431].

Envelope Support for Item Terms in Guided Sourcing Events

With the envelope bidding feature enabled, sections, items, and questions in guided sourcing events can be included in different envelopes. Supplier responses to items and questions are not revealed until the corresponding envelopes are opened.

When an item is assigned to an envelope, all terms for the item automatically go inside the same envelope as the item's envelope. When the envelope of this item is opened, supplier responses to all terms of this item are revealed. However, you might not want to reveal all the item terms at the same time or to the same personnel. For example, you might want your technical teams to only view the technical terms of this item and your commercial teams to view the commercial terms later.

In cases like this, you can enable the envelope support for item terms feature to enclose an item term in an envelope that is different from the envelope of the item or from the envelopes of other terms. Supplier responses to a term are not revealed until the envelope where the term resides is opened.

To enable the envelope support for item terms feature, you must set the ICM parameter **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and the event rule **Allow terms of an item to be in separate envelopes** both to **Yes**. If you enable this feature, each term in a guided sourcing event must be included in one and only one envelope. No term can be left outside envelopes. If a term is shared by multiple items, the term of all these items go to the same envelope. An item can be awarded only when all its term envelopes are opened. If you also enable the grading and scoring feature, you are not allowed to set weight for content in the last envelope, which means that the last envelope cannot be graded.

You can assign an item term to an envelope simply by selecting an envelope in the **Envelope** field when you add or edit an item or term.

Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]

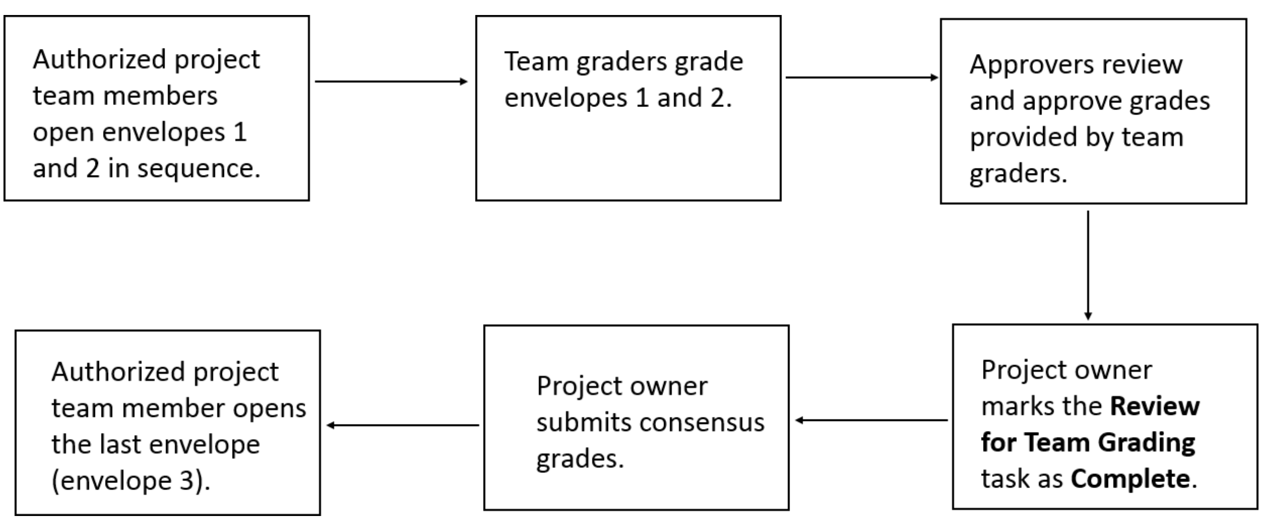
Ability to Restrict the Last Envelope in Guided Sourcing Events from Being Opened Until Consensus Grades Are Submitted for Previous Envelopes

You can add a restriction to the envelope opening process in guided sourcing to prevent project team members from opening the last envelope until previous envelopes are graded and consensus grades are submitted for previous envelopes.

For example, in a guided sourcing event with envelope bidding enabled, you can allow terms of an item to be enclosed in separate envelopes, and enclose the commercial terms of event items in the last envelope and technical terms in previous envelopes. Then, you can apply the restriction for this feature to make sure that supplier responses to technical terms are fully evaluated before the commercial team reviews the commercial responses and that the commercial information is not revealed to the technical evaluation team.

> Note
>
> To allow terms of an item to be enclosed in separate envelopes, set the ICM parameter **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and the event rule **Allow terms of an item to be in separate envelopes** both to **Yes**.

Assuming that you have three envelopes in your guided sourcing event, the envelope bidding and grading workflow with this restriction enabled is as follows:



To enable the restriction for this feature, your site must:

- Have the envelope bidding feature enabled. For details, refer to Building Envelopes in Guided Sourcing Events [page 425].
- Have the grading and scoring feature enabled. For details, refer to Grading and Scoring in Guided Sourcing Events [page 613].
- Have the two ICM parameters **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) both set to **Yes**
- Have the event rule **Prevent opening the last envelope until consensus grades are submitted for previous envelopes** set to **Yes**.

Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]
Enable envelope for item terms
Enable grading-based item award

Envelope Rules for Guided Sourcing Events

Number of Envelopes

Sealed-envelope bidding is used when laws require that buyers must view event sections that contain supplier responses in sequence. After buyers open an envelope, the next section (envelope) in the series immediately becomes available to open.

For sealed-envelope bidding, you can specify **Number of Envelopes** that you want to use in an event. The default setting is **No Envelope**, and the maximum is **9** envelopes.

You can add sections to an envelope. Responses of participants within sections associated with an envelope are not visible to the project team until the envelope is opened during the **Review responses** period.

For example, if the first section contains questions about technical specifications, this event can enforce that participants be qualified or disqualified before the buyer can see the second section, containing their price quotes. Envelopes work as follows:

- When you create a section, you specify whether it belongs to an envelope, and if so, which one.
- An envelope can contain more than one section.
- An envelope contains responses for all event participants for that section.
- Buyers can see only responses in envelopes that are open.
- They can only open envelopes in sequence.
- When the buyer discontinues a participant, all the responses of the participant (opened or not) are deleted, unless the **Keep the Rejected Envelope Bids** and **Discard Bids for Event Updating** rules are configured.

> ⓘ Note
>
> The envelope bidding rule **Number of Envelopes** is not available for large-capacity events.

Authorize Teams to Open Envelopes

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.

If you do not want to authorize a specific project team to open an envelope, leave the **Team** field blank in the **Authorize Teams to Open Envelopes** section.

If the event rule **Send notification to envelope openers** is set to **Yes**, project group members who are authorized to open an envelope receive a notification email when an envelope is ready to be opened. Event owners and active observers receive a notification email when envelopes have been opened.

Will Teams Control Envelope Access?

This rule 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.

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). In most cases, we recommend that you set this rule to **Yes**, so that you allow the authorized group to see responses **before** selecting participants to advance to the next envelope opening. See the envelope access workflow in the *Event management guide* for more information.

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.

Allow Rejected Envelope Bids to Be Opened

This rule only appears when **Keep the Rejected Envelope Bids** is set to **Yes**. Select **Yes** to allow envelope bids to be opened after they are rejected.

A modified envelope bidding agreement alerts suppliers that rejected envelopes might be recovered during the event. Suppliers must accept the agreement before they can participate in the event. The event audit logs are updated when suppliers accept the agreement and when rejected envelopes are opened.

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 envelope bids after you edit and update an event.

Send Notification to Envelope Openers

Select **Yes** to have SAP Ariba notify project team members when they can open their assigned envelope.

Separate Envelopes for Primary and Alternative Bids

If alternative bidding is enabled (with the event rule **Can participants create alternative responses?** set to **Yes**),you can include primary and alternative bids in separate envelopes so that authorized team members evaluate primary and alternative responses separately.

Allow terms of an item to be in separate envelopes

This rule allows you to enclose an item term in an envelope that is different from the envelope of the item or from the envelopes of other terms. Supplier responses to a term are not revealed until the envelope where the term resides is opened.

If you enable this rule, each term in a guided sourcing event must be included in one and only one envelope. If you also enable the grading and scoring feature, you are not allowed to set weight for content in the last envelope, which means that the last envelope cannot be graded.

This rule appears only when the ICM parameter **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) is set to **Yes** and the **Number of Envelopes** event rule is set to an integer ranging from 1 to 9.

Prevent opening the last envelope until consensus grades are submitted for previous envelopes

This rule requires that the last envelope in a guided sourcing event be opened after consensus grades are submitted for previous envelopes in the system.

This rule appears only when the following conditions are met:

- The two ICM parameters **Enable envelope for item terms** (`Application.ACM.EnableEnvelopeForItemTerms`) and **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) are both set to **Yes**.
- The **Number of Envelopes** event rule is set to an integer ranging from 1 to 9.

- The **Enable scoring on participant responses** event rule is set to **Yes**.

Parent topic: Envelope Bidding in Guided Sourcing Events [page 414]

Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]
Building Envelopes in Guided Sourcing Events [page 425]
Opening Envelopes in Guided Sourcing Events [page 429]
Recovering and Opening Rejected Envelopes [page 431]

Building Envelopes in Guided Sourcing Events

Use this procedure to build envelopes in guided sourcing events.

Context

You can create guided sourcing events with mutilple envelopes, for example, technical and commercial, to make sure that the participant responses are not visible until the envelopes are opened by authorized team members.

To build envelopes, you need to:

1. Set envelope rules in a guided sourcing template.
2. Create a guided sourcing event from this template.
3. Assign event content to different envelopes.

Sections at the root level can be made part of 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.

> ⓘ Note
>
> If you want to put line items and questions in the same envelope, you need to create a section in the **Items that need quotes panel** and **Questions, requirements, and attachments** panel, separately, and assign the two sections to the same envelope. Then, you add line items and questions to the two sections.

Task overview: Envelope Bidding in Guided Sourcing Events [page 414]

Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]

[Envelope Rules for Guided Sourcing Events [page 422]](#)
Opening Envelopes in Guided Sourcing Events [page 429]
Recovering and Opening Rejected Envelopes [page 431]

Set Envelope Rules in a Guided Sourcing Template

Use this procedure to set envelope rules in a guided sourcing 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.
- To use this feature, you must either:
  - Enable envelopes in competitive events by setting the ICM parameter **Enable envelope for competitive event** (`Application.AQS.RFX.EnableEnvelopeForCompetitiveEvent`) to **Yes** for your site.
  - Configure the event as a non-competitive event and ensure that the following event rule requirements are met:
    - If the bidding rule **Must participants improve their bids** is visible, it is set to **No**.
    - If the market feedback rule **Show lead bid to all participants** is visible, it is set to **No**.

Procedure

1. On the dashboard, click **Manage** > **Templates** or click **Manage templates** in the Quick links section of the **For You** dashboard.
2. Choose and open the guided sourcing template you want to edit, or create one.

   When you are creating a guided sourcing template, make sure that the template property **Guided Sourcing Template** is set to **Yes**.
3. Add project groups and team members to the project template.
   - If the template is a full project template, add project groups and team members on the template's **Team** tab. For details, refer to Project Groups and Team Members for Project Templates.
   - If the template is a quick project template, choose **Actions** > **Edit Team** in the **Properties** section of the template to add project groups and team members.

   > **Note**
   >
   > Adding project groups and team members to the project template standardizes the roles and permissions (such as access, task ownership, or approval responsibilities) for all projects created from the template, and also eliminates the need to add project groups for each single event.
4. Click the name of the template you want to edit in the **Documents** section (or on the **Documents** tab for a full project template) and choose **Action** > **Edit**.

5. On the **Rules** page of the template, check whether the **Envelope Rules** section shows up.

   If the **Envelope Rules** section doesn't show up, perform either of the following actions:
   - Enable envelopes in competitive events for your site by setting the ICM parameter **Enable envelope for competitive event** (`Application.AQS.RFX.EnableEnvelopeForCompetitiveEvent`) to **Yes**.
   - Configure the event as a non-competitive event and ensure that the rules **Must participants improve their bids** and **Show lead bid to all participants** are set to **No** or are not visible.
6. Under the **Envelope Rules** section, configure the following envelope rules based on your needs:
   - **Number of Envelopes** - Select the maximum number of envelopes to use in an event. The default is **No Envelope**, and the maximum is **9** envelopes.
   - **Authorize Teams to Open Envelopes** - Select a project team for each envelope. Members of the project team you select here are 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. You can also select the project teams on the **Set event rules** page when you create a guided sourcing event. For details, refer to Authorizing Project Teams to Open Envelopes [page 417].

     > Note
     >
     > **Authorize Teams to Open Envelopes** appears when you specify one or more envelopes for **Number of Envelopes**.
   - **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.
   - **Separate envelopes for primary and alternative bids** - Select **Yes** to include primary and alternative bids in different envelopes.

   See Envelope Rules for Guided Sourcing Events [page 422] for additional information about envelope rules.
7. Choose to delegate, hide, or make the envelope bidding rules read-only.

   If you delegate the envelope bidding rules, owners of guided sourcing events that are created from this template can edit the rules on the **Set event rules** page of guided sourcing.
8. Publish the template.

Next Steps

After you publish the template, create a guided sourcing project from this template, and assign event content to envelopes.

Related Information

Must participants improve their bids

[Event Market Feedback Rules](#)
[Enabling Envelopes in Competitive Events](#)

Assigning Content to Envelopes in Guided Sourcing Events

Use this procedure to assign guided sourcing event content to different envelopes.

Prerequisites

- You have set envelope rules in a guided sourcing template and have created a guided sourcing project from this template.
- You must be the event owner or have project owner capabilities for the event.

Procedure

1. Open an event created from a template with envelope rules configured. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Check the envelope rules to make sure that these rules are configured as desired.
3. In the **Items that need quotes** panel, choose **Add** > **Section**. Enter a name and description for the section, and assign this section to an envelope by selecting the desired envelope ID from the drop-down list. Then, add sub-sections, line items, service items, or lots to the section if you want to put them in the envelope.
    - If you leave **Envelope** with the default value **No Envelope**, the section is not assigned to any envelope, and participant responses to items in this section are visible to all project team members.
    - Only sections at the root level can be assigned to envelopes. Sub-sections and other event content, for example, line items, service items, lots, and questions, that you want to put in an envelope must be included in a section.
4. In the **Questions, requirements, and attachments** panel, add a section and assign this section to an envelope by selecting the desired envelope ID. Then, add questions, requirements, or attachments to this section if you want to include them in an envelope.
5. Invite suppliers to this event and publish the event.

Opening Envelopes in Guided Sourcing Events

Use this procedure to open envelopes in guided sourcing events.

Context

Envelopes can be opened only when guided sourcing events are in the **Review responses** state. If the project (or event) owner has authorized project teams (groups) to open envelopes, only authorized team members can open the corresponding envelopes. For other team members (even the project or event owner) who are not authorized to open the envelopes, participant responses in the envelopes are invisible to them.

A guided sourcing event typically has multiple envelopes, and these envelopes are opened sequentially.

For clarity, the following workflows are written using the following names and configuration:

- The guided sourcing event contains two envelopes: envelope 1 and envelope 2.
- The technical group is authorized to open envelope 1. User A is in the technical group.
- The commercial group is authorized to open envelope 2. User B is in the commercial group.

> ⓘ Note
>
> Users A and B must be a member of the **Category Buyer** group. Otherwise, they cannot see the guided sourcing user interface.

- The event is in the **Review responses** state.

The procedure for opening envelopes varies depending on whether the **Will teams control envelope access?** event rule is enabled. If **Will teams control envelope access?** is set to **Yes**, authorized group members first open envelopes, then select the participants who advance to the next envelope. If **Will teams control envelope access?** is set to **No**, authorized group members first select participants to advance to the next envelope, then open only the envelopes of the selected participants.

Task overview: Envelope Bidding in Guided Sourcing Events [page 414]

Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]
Envelope Rules for Guided Sourcing Events [page 422]
Building Envelopes in Guided Sourcing Events [page 425]
Recovering and Opening Rejected Envelopes [page 431]

Will teams control envelope access? Is Disabled

Use this procedure to open envelopes when **Will teams control envelope access?** is disabled.

Procedure

1. User A (a member of the technical group, which is authorized to open envelope 1) clicks **Open envelope** in the upper right corner of the event page.
2. On the **Open envelope 1** page, user A selects the participant responses that they'd like to reveal in envelope 1, and click **Open envelope**.

   Envelope 1 is opened, and the selected participant responses are now displayed for items in envelope 1.

   > Note
   >
   > - To view items included in envelope 1, click the **Review envelope content** tab.
   > - If you have not selected all participant responses, unselected participant responses are marked as "Rejected" and are hidden from the event after the envelope is opened. Rejected envelopes can be recovered and opened if the event rule **Allow rejected envelope bids to be opened** is set to **Yes**. For more information, refer to Ability to Recover Rejected Envelopes [page 420].
   > - The participants you have selected here advance to the next envelope.

3. User B (a member of the commercial group, which is authorized to open envelope 2) clicks **Open envelope** in the upper right corner of the event page.
4. On the **Open envelope 2** page, user B selects the participant responses that they'd like to reveal in envelope 2, and click **Open envelope**.

   > Note
   >
   > The participant responses that are available for user B to choose for envelope 2 are those that have advanced from envelope 1.

Will teams control envelope access? Is Enabled

Use this procedure to open envelopes when **Will teams control envelope access?** is enabled.

Procedure

1. User A (a member of the technical group, which is authorized to open envelope 1) clicks **Open envelope** in the upper-right corner of the event page.

   Envelope 1 is opened, and responses from all participants are now displayed for items in envelope 1.

> ⓘ Note
>
> If the even rule **Separate envelopes for primary and alternative bids** is also set to **Yes**, envelope 1 is not directly opened after user A clicks **Open envelope**. Instead, the **Open envelope 1** page is displayed and user A is asked to select the primary or alternative responses that they'd like to reveal in envelope 1. After user A selects the participant responses and clicks **Open envelope**, envelope 1 is opened for the selected participant responses.

2. User A clicks **Choose suppliers for next envelope** in the upper-right corner of the event page. On the **Choose suppliers for next envelope** page, uesr A selects participants that they'd like to advance to envelope 2, and clicks **Unseal next envelope**.
3. User B (a member of the commercial group, which is authorized to open envelope 2) clicks **Open envelope** in the upper-right corner of the event page.

   Envelope 2 is opened, and responses from participants that have advanced from envelope 1 are now displayed for items in envelope 2.

Recovering and Opening Rejected Envelopes

Use this procedure to recover and open rejected envelopes.

Prerequisites

- You must be in the **Recover Rejected Envelopes** group.
- The event must be in the **Review responses** state.

Context

After all envelopes in an event are opened, you can recover and open envelope bids that are rejected previously if the event rule **Allow rejected envelope bids to be opened** is set to **Yes**.

Procedure

1. Open the desired guided sourcing event.
2. Click **Open rejected envelopes** in the upper-right corner of the event page.
3. Select the rejected supplier bid that you'd like to recover, and click **Open rejected envelopes**.
4. **Optional:** Check the box **Send Emails to Participants** if you want to alert participants that their envelope has been opened.

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Related Information

About Envelope Bidding in Guided Sourcing Events [page 415]
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Opening Envelopes in Guided Sourcing Events [page 429]

Alternative Bidding in Guided Sourcing Events

Alternative bidding gives suppliers (participants) the ability to submit alternate bids after they have submitted a primary bid based on a guided sourcing event as you have defined it. You can then view the primary and alternative pricing responses and decide what meets your needs the best.

Alternative bidding not only allows you to collect the pricing you want, it also allows participants to choose the best or most appropriate way to submit a response. For example, you want to collect pricing for red balloons. However, participants may want to stand out by offering yellow balloons at a lower price. By enabling alternative bidding, you allow participants to provide this information after they submit their primary bid.

Currently, only alternative pricing is available in guided sourcing. Supplier bundles and volume tiers are not supported.

Alternative pricing allows participants to submit different values for the terms included in an item and adjust their price accordingly. You can then view the primary and alternative pricing responses and decide what meets your needs the best.

Guided sourcing supports alternative bids based on varying pricing conditions. 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.

In guided sourcing, you need a combination of template-level configurations and event-level settings to create events that support alternative bids based on pricing conditions.

Typically, a template author creates templates with alternative bidding rules configured for event creators, as described in Configuring Event Templates for Alternative Bidding.

[Creating Guided Sourcing Events with Alternative Bidding [page 440]]
[Enabling Pricing Conditions-Based Alternative Bids in Guided Sourcing [page 442]]
[Limiting Volume Scale Overrides by Suppliers Only to Alternative Bids in Guided Sourcing [page 443]]

Alternative Bidding Rules for Guided Sourcing Events

Alternative bidding is controlled by event rules. If you want to enable alternative bidding, you need to enable related rules in a guided sourcing template.

The following table describes the event rules related to alternative bidding:

Rule	Description	Remarks
Can participants create alternative responses?	Determines whether participants can submit alternative bids.	Choose **Yes** if you want to allow participants to submit alternative bids. Additional alternative bidding rules (listed in the following rows) appear after you choose **Yes**.
Can participants create alternative pricing?	Determines whether participants can create alternative pricing in their alternative bids. Alternative pricing allows participants to submit different values for the terms included in an item and adjust their price accordingly.	You must choose **Yes** for **Can participants create alternative responses?** for this rule to appear.
Include alternative pricing bids when bids are ranked	Determines whether you can include alternative pricing bids together with primary bids in bid ranking.	You must choose **Yes** for **Can participants create alternative responses?** and **Can participants create alternative pricing?** for this rule to appear.
Should questions be visible in alternatives?	Determines whether event questions are visible to participants when participants add alternative responses.	This event rule is available when the following conditions are met: • The feature **SSR-393: Show Questions in Alternatives** is enabled. • The event rule **Can participants create alternative responses?** is set to **Yes**.

Rule	Description	Remarks
Should there be a limit on number of alternatives?	Determines whether there is a limit to the number of alternative responses that a participant can provide.	This event rule is available when the following conditions are met: • The feature **SSR-553: Supplier Alternatives - Limit number of Pricing alternatives** is enabled. • The event rule **Can participants create alternative responses?** is set to **Yes**. • If a maximum value is set for the number of alternative responses allowed, when a participant tries to add an alternative response beyond the limit, a message is displayed to indicate that they have exceeded the limit.
Alternative Limit value	Determines the maximum number of alternative responses that a participant can provide.	You must choose **Yes** for **Should there be a limit on number of alternatives?** for this rule to appear.

For more information, refer to Event Bidding Rules.

Parent topic: Alternative Bidding in Guided Sourcing Events [page 432]

Related Information

Monitoring Alternative Bids in Guided Sourcing [page 435]
Including Alternative Bids in Bid Ranking for Guided Sourcing Events [page 436]
Supporting Multi-Currency for Alternative Bids in Guided Sourcing [page 437]
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Monitoring Alternative Bids in Guided Sourcing

You can monitor alternative bids on the guided sourcing event monitoring page.

The **Items that need quotes** panel on the event monitoring page display the primary and alternative bids of each supplier in columns. The **Questions, requirements, and attachments** panel displays the answers of each supplier to questions in primary and alternative bids in columns.

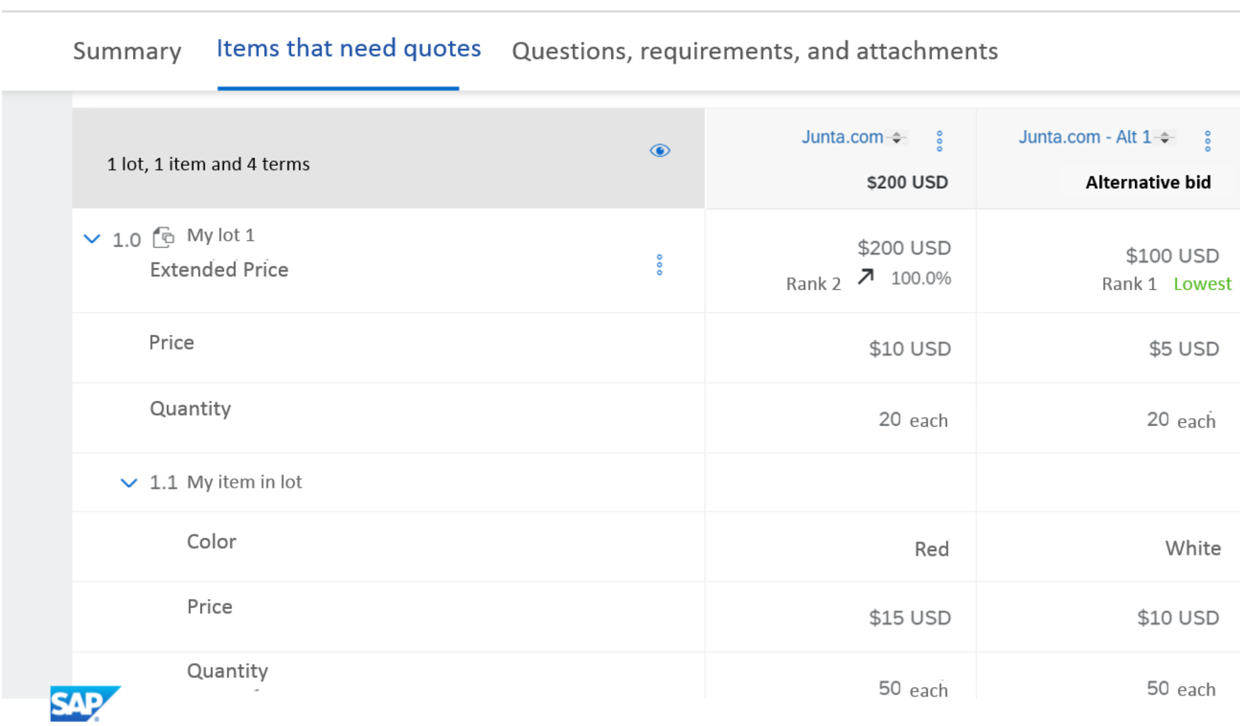
Primary bids are displayed in the columns named with the supplier's name, for example, **Big Box Retail**. Alternative bids are displayed in the columns named with the supplier name, followed by the alternative bid name, for example, **Big Box Retail - Alt 1**, where **Alt 1** is the alternative bid name that a supplier specified when they created the alternative bid.

In addition to the bid name, you can easily identify an alternative bid by checking whether **Alternative bid** is displayed next to the bid name. If it is displayed, it is an alternative bid. Otherwise, it is a primary bid.

You can click the right arrow icon ( ) before an item under the **Items that need quotes** panel of the event monitoring page to expand terms added for the item and participant responses to these terms in their primary and alternative bids.

You can control which alternative bids are displayed in the **Items that need quotes** and **Questions, requirements, and attachments** panels by clicking the eye icon ( ) next to the search box or clicking the more action icon ( ) next to an alternative bid.

The following figure provides an intuitive view of the event monitoring page of guided sourcing.



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Including Alternative Bids in Bid Ranking for Guided Sourcing Events

You can include alternative bids together with primary bids in bid ranking, making it easier to compare bids when an event includes alternative bids.

The primary bid of a participant can differ from the alternative bid of the same participant only because the values for terms (for example, delivery terms) are different. In cases like this, you can make a subjective call after analyzing the rankings.

The event bidding rule, **Include alternative pricing bids when bids are ranked**, controls whether to include alternative bids when bids are ranked. The default value for this event rule is **No**.

If the rule **Include alternative pricing bids when bids are ranked** is set to **Yes**, alternative bids are ranked together with primary bids on the **Items that need quotes** and **Allocate awards** panels.

Refer to Creating Guided Sourcing Events with Alternative Bidding [page 440] or Configuring Event Templates for Alternative Bidding for the rule settings required to make the **Include alternative pricing bids when bids are ranked** rule available.

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Related Information

Alternative Bidding Rules for Guided Sourcing Events [page 433]
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Supporting Multi-Currency for Alternative Bids in Guided Sourcing

In guided sourcing events with alternative bidding and multi-currency enabled, participants can choose the bidding currency for the lots and line items they plan to bid on in alternative responses. Participants can choose one bidding currency for all items or choose a different bidding currency for each item.

Multi-currency events are configured by setting the event rule **Allow participants to select bidding currency** to **Yes**. In multi-currency events, the template author or event owner also configures the following items in the event rules:

- The currency exchange rate set for the event. Currency exchange rate sets (also referred to as currency conversion rate sets) are defined by administrators using the Ariba Administrator, as described in the *Common data import and administration guide for SAP Ariba Strategic Sourcing and Supplier Management solutions*.
- The event rule **Show currency exchange rates to participants**, which specifies whether currency exchange rates are visible to participants.

For more information, refer to About International Events.

Parent topic: Alternative Bidding in Guided Sourcing Events [page 432]

Related Information

Alternative Bidding Rules for Guided Sourcing Events [page 433]
Monitoring Alternative Bids in Guided Sourcing [page 435]
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Allowing Suppliers to Add Items and Lots to Alternative Bids

To collect content that suppliers might want to provide in addition to those defined in a guided sourcing event, you can enable the **Allow suppliers to add items** event rule to allow suppliers to add items and lots to both primary and alternative bids.

If you only want suppliers to add items and lots to alternative bids, you can enable both **Allow suppliers to add items** and **Allow supplier-added items only in alternative bids** event rules.

For more information about supplier-added items, refer to Supplier-Added Items in Guided Sourcing Events [page 467].

Parent topic: Alternative Bidding in Guided Sourcing Events [page 432]

Related Information

Alternative Bidding Rules for Guided Sourcing Events [page 433]
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Awarding Alternative Bids in Guided Sourcing

You can award lots or items in alternative bids to multiple participants by percentage or quantity.

Note that preconfigured award scenarios **Best Bid**, **Best Bid with Limited Number of Suppliers**, and **Best Savings** do not support awarding alternative bids. If you want to award alternative bids, manually create a scenario.

For more information about awarding guided sourcing events, refer to Review Responses and Award Creation for Guided Sourcing Events [page 513].

Parent topic: Alternative Bidding in Guided Sourcing Events [page 432]

Related Information

Alternative Bidding Rules for Guided Sourcing Events [page 433]

Hiding Alternative Bids in Guided Sourcing

Use this procedure to hide alternative bids in guided sourcing.

Context

You can control which alternative bids are displayed in the **Items that need quotes** and **Allocate awards** panels on the event monitoring and award pages. You can hide all alternative bids or display only the ones you want to review.

Procedure

1. Go to the **Items that need quotes** on the event monitoring page or the **Allocate awards** panel on the event award page.
2. Hide bids using either of the following methods:
    - Click the eye icon ( ) to display the bid list. Then, click a bid (either primary or alternative) to hide or show the bid, or click **Hide all** or **Show all** to hide or show all the bids.
    - Click the more action icon ( ) next to each bid and select **Hide supplier**.

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Related Information

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Limiting Volume Scale Overrides by Suppliers Only to Alternative Bids in Guided Sourcing [page 443]

Creating Guided Sourcing Events with Alternative Bidding

Use this procedure to create guided sourcing events with alternative bidding.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.
- You have created a guided sourcing event template with alternative bidding rules configured. For details about how to configure an event template for alternative bidding, refer to Configuring Event Templates for Alternative Bidding and Configuring Event Templates for Guided Sourcing.

Context

Alternative bidding gives suppliers (participants) the ability to submit alternate bids after they have submitted a primary bid based on a guided sourcing event as you have defined it.

Typically, a template author creates templates with alternative bidding rules configured for event creators. The alternative bidding rules in a guided sourcing template include:

- **Can participants create alternative responses?**
- **Can participants create alternative pricing?**
- **Include alternative pricing bids when bids are ranked**
- **Should questions be visible in alternatives?**
- **Should there be a limit on number of alternatives?**
- **Alternative Limit value**

Out of these rules, only **Can participants create alternative responses?** is available on the **Set event rules** page for a guided sourcing event.

To allow suppliers to add items and lots to alternative bids, enable the **Allow suppliers to add items** event rule. For more information, refer to Supplier-Added Items in Guided Sourcing Events [page 467].

The following procedure describes steps related to alternative bidding in detail, but does not provide detailed instructions for general operations, for example, setting event duration and inviting participants. For these general operations, refer to *Managing events with guided sourcing* for more information.

Procedure

1. Create a guided sourcing project from the template with alternative bidding enabled. For more information, refer to Creating a Guided Sourcing Project or Event from a Template [page 80].
2. On the guided sourcing interface, click the more action icon (•••) in the upper-right corner, and select **Event settings** > **Set event rules**. Check and make sure that the rule **Can participants create alternative responses?** is selected.
3. **Optional:** If you have set **Allow participants to select bidding currency** to **Yes** in the template from which this event is created, select an exchange set on the **Set event rules** page.
4. On the **Event duration** panel, set the event start and end time.
5. On the **Suppliers** panel, invite participants to the sourcing event.
6. On the **Items that need quotes** panel, add lots and items for the participants to bid on.
7. Click the more action icon (•••) next to each item or lot and select **Add terms** to add a desired term.
8. Select one or all items and lots, and click **Edit terms**. On the **Term attributes** tab, set **Is term editable in alternatives?** to **Editable by Owner and Participant** if you want participants to provide different values for a term in their alternative responses.

   > Note
   >
   > - An initial value is required for terms with **Set initial value** displayed.
   > - Terms with formulas are not editable, and therefore don't have the **Is term editable in alternatives?** configuration.
   > - 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.

9. On the **Questions, requirements, and attachments** panel, add a question. Then, select the question and click **Edit questions**. Select **Editable by Owner and Participant** for **Is term editable in alternatives?**.

   This configuration enables participants to answer the question in alternative bids.
10. Click **Publish**.

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Related Information

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Enabling Pricing Conditions-Based Alternative Bids in Guided Sourcing

The pricing conditions feature is available only on sites that have SAP Ariba Strategic Sourcing Suite enabled. In guided sourcing, you can use this procedure to create sourcing events that support alternative bids based on pricing conditions.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- To be able to create or edit guided sourcing templates, you must be a member of the global **Template Creator** group or the template project's **Templates Creator** team.
- Your site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.

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.

In guided sourcing, you need a combination of template-level configurations and event-level settings to create events that support alternative bids based on pricing conditions.

Procedure

1. From the create or edit template flow, ensure that the following rules are set to **Yes**:
   - **Can participants create alternative responses**
   - **Can participants create alternative pricing**
2. From the create [page 80] or edit [page 255] event page, enable the **Allow pricing conditions** toggle.

   When you enable the **Allow pricing conditions** toggle, the **Can edit pricing condition terms in alternatives** rule appears.

3. Set the **Can edit pricing condition terms in alternatives** rule to **Yes**.

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Related Information

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Limiting Volume Scale Overrides by Suppliers Only to Alternative Bids in Guided Sourcing

Buyers can use this procedure to limit volume scale overrides by suppliers only to alternative bids so that the volume scales in primary bids are uniform for a consistent comparison. Note that the pricing conditions feature is available only on sites that have SAP Ariba Strategic Sourcing Suite enabled.

Prerequisites

- The following rules must be set to **Yes** in the document workspace of the project template used in the guided sourcing event:
  - **Can participants create alternative responses**
  - **Can participants create alternative pricing**
  - **Allow Pricing Conditions**
  - **Can edit pricing condition terms in alternatives**
  - **Can supplier override volume scales**
- To be able to create or edit guided sourcing templates, you must be a member of the global **Template Creator** group or the template project's **Templates Creator** team.
- Your site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.

Context

When you have added support for pricing conditions-based alternative bids for your guided sourcing events and allowed suppliers to override pre-configured volume scales, you can choose to limit volume scale overrides by suppliers to alternative bids only. By doing so, you can receive primary bids with uniform volume scales for consistent comparison of bids from all participants. Suppliers continue to have the flexibility to customize volume scales in alternative bids to make their best offers.

You can allow suppliers to override volume scales by configuring a rule at the project template level. The template level configuration is delegated to the event level and then to the item level. If the configuration is modified at the event level or the item level, the result is applicable to the corresponding event or the item only.

Procedure

1. From the dashboard, open the guided sourcing project template for editing.
2. Go to the **Documents** tab and open the corresponding document workspace.
3. Under the **Rules** section, set the **Allow overrides only in alternative bids** to **Yes**.
4. Save the changes and publish the template.

Results

Guided sourcing events created using this template will allow suppliers to override volume scales only in alternative bids.

Next Steps

You can modify the configuration at:

- The event level, to allow suppliers to override volume scales only for specific events. Open the guided sourcing event, navigate to the upper-right corner of the event page and click the more options icon (•••), then select **Event settings** > **Set event rules**.
- The item level, to allow suppliers to override volume scales only for specific items in an event. Open the guided sourcing event, go the **Items that need quotes** section, select the required item, and click **Edit pricing conditions**.

> **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** ▶.

Task overview: Alternative Bidding in Guided Sourcing Events [page 432]

Related Information

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Email Bidding in Guided Sourcing Events

Email bidding enables buyers to allow suppliers email their bid sheets as Microsoft Excel file attachments.

When buyers use email bidding, the supplier invitations include a spreadsheet that contains the items in the event. Now, an additional sheet, **Pricing Conditions**, is also included in the Excel. Participants or suppliers who are invited to submit bids can perform email bidding even for line items having terms with advanced pricing conditions enabled.

When suppliers mail their completed Excel bid sheets to guided sourcing, it automatically reads through the bid sheet and submits the supplier's bids to the event.

Prerequisites

The **Allow participants to submit bids by email** event rule must be set to **Yes**. The default is **No**. For more information about this rule, see Allow participants to submit bids by email.

For more information about email bidding, see Creating Content for Email Bidding. Email bidding uses the simplified Excel upload format. For more information about this format, see Importing Guided Sourcing Line Items with the Simplified Excel Import Feature [page 317].

Email bidding is supported in multi-round guided sourcing events [page 465]. Email bidding isn't supported in multi-stage events.

Configuring Column and Row Formats for Standard Offline Response Spreadsheets in Guided Sourcing

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
Intelligent Configuration Manager Administration
Parameter Management in Intelligent Configuration Manager
Custom Offline Response Sheets in Guided Sourcing Events [page 447]

Custom Offline Response Sheets in Guided Sourcing Events

Custom offline response sheets enable you to create and import your own customized version of an offline bid sheet for guided sourcing events.

Buyers can configure guided sourcing events to use bid responses from customized offline response sheets for items, lots (basket without items and item lot), and questions. You can either import a default custom offline response sheet for all participants, a common custom offline response sheet for a group of participants, or a participant-specific custom offline response sheet for each participant. Based on the event configuration for items and questions, event participants can use the customized offline bid sheets to submit their bid responses.

You can determine the content that can be customized in offline response sheets. You must map cell values from your custom offline response sheet into the Offline Content sheet. You can control what content is customized at the content row level. For example, you can determine which questions can be customized in an offline response sheet and answer the remaining questions in the guided sourcing user interface. For more information, see Configuring Guided Sourcing Events to Use Custom Offline Responses [page 448].

Event participants can use the customized offline response sheets to submit their bid responses based on the event configuration for items, lots (basket without items and item lot), and questions.

> Note
>
> Participants cannot respond to non-customized content using the customized offline response sheet when you enable custom offline responses. Participants must respond to non-customized content using the user interface.

Prerequisites

You must enable the **Enable custom offline response** rule in the **Set event rules** page of the guided sourcing event. For more information, see Editing Event Rules in Guided Sourcing Events [page 255].

Restrictions

You cannot use custom offline response sheets to collect bid responses from participants for sections, attachments, requirements, material master items, and service line items.

Custom offline response sheets are only applicable to RFP and auction events that contain:

- Line items
- Questions
- Lots, when the **Lot Type** is any of the following:
  - **Basket with No Items - Bid at Lot level, compete at Lot level (do not collect item pricing)**
    Lot without an item will be available for offline bidding.
  - **Item Lot - Bid at Item level, compete at Lot level (collect item pricing during bidding)**
    Items within the lot will be available for offline bidding.

Configuring Guided Sourcing Events to Use Custom Offline Responses

Use this procedure to configure guided sourcing events to use custome offline responses.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or a user with project owner capabilities for the event.
- You must have enabled the **Enable custom offline response** rule in the **Set event rules** page of the guided sourcing event. For more information, see Editing Event Rules in Guided Sourcing Events [page 255].

Context

You can configure guided sourcing events to receive bid responses from the participants through customized offline response sheets for items and questions.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).

4. Click the event ID link to open the guided sourcing event.
5. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
6. Configure items and questions to receive bid responses from custom offline response sheets.

   To configure line items, perform any of the following steps:
   - From the **Items that need quotes** panel, select **Add** > **Item**. In the **Add item** popup, select the **Add to offline bid** checkbox and click **Add**.
   - From the **Items that need quotes** panel, select the *More* icon (...) available for individual line items and click **Add to offline bid**.
   - To add multiple line items, select the line items in the **Items that need quotes** panel and click the **Add to offline bid** button available in the panel.

   To configure questions, perform any of the following steps:
   - In the **Questions, requirements, and attachments** panel, select the *More* icon (...) available for individual questions and click **Add to offline bid**.
   - To add multiple questions, select the questions in the **Questions, requirements, and attachments** panel and click the **Add to offline bid** button available in the panel.

Results

The **Customized Offline Bid** icon () is displayed next to the item or question configured to use custom offline responses.

Uploading a Default Custom Offline Response Sheet for All Participants in Guided Sourcing

Use this procedure to upload a default custom offline response sheet for all participants.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or a user with project owner capabilities for the event.
- You must have enabled the **Enable custom offline response** rule in the **Set event rules** page of the guided sourcing event. For more information, see Editing Event Rules in Guided Sourcing Events [page 255].
- The sourcing event must have at least one line item or question before you can import a custom offline response sheet.

> **Restriction**
>
> The .xlsx file format import is not supported for custom offline response sheets. This is in line with the classic SAP Ariba Sourcing.

Context

You can import a default custom offline response sheet for all participants at the event level. Event participants can use the customized offline response sheets to submit their bid responses based on the event configuration for items and questions.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the *More* icon ( ) in the upper-right corner of the event draft page and select **Import Custom Offline Bid**.

   The **Import Custom Offline Bid Sheet** page opens.

   > Note
   >
   > The **Import Custom Offline Bid** option is available only if you have configured items or questions to use bid responses from the custom offline response sheet.
6. Click the custom offline bid sheet link.

   The default custom offline response sheet that applies to all event participants is downloaded.
7. Edit the custom offline response sheet. To define a relationship between your online and offline content, insert Excel formulas in the Offline Content sheet.

   Example 1: You want to define a relationship between the Other Content and the Offline Content sheets to receive item price, then:
   1. In the Offline Content sheet, define the field name (such as item name) that you want to map to the Other Content sheet. If you want to map a cell named Item A in the Offline Content sheet with a cell named Item 1 in the Other Content sheet, then in the Item A cell in the **Offline Content** sheet, insert the formula as = `"Other Content"!<cell number for Item 1>`. So, if Item 1 in the Other Content sheet is in the B5 cell, then the formula for Item A will be `= "Other Content"!B5`.
   2. In the Other Content sheet, define the field value (such as item price) that you want to map to the Offline Content sheet. If you want to map values of two cells named Shipping Cost and Packaging Cost in the Offline Content sheet to a cell named Price in the Other Content sheet, where Price value = Shipping Cost value + Packaging Cost value, then in the Price cell in the Other Content sheet, insert the formula as = `'Offline Content'!<cell number for Shipping Cost>+'Offline Content'!<cell number for Packaging Cost>`. So, if the Shipping Cost and the Packaging Cost in the Offline Content sheet are in B4 and C4 cells, respectively, then the formula for the Price cell in the Other Content sheet will be = `'Offline Content'!B4+'Offline Content'!C4`.

Example 2: You want to define a relationship between the Other Content and the Offline Content sheets to receive responses to questions, then:

1. In the Offline Content sheet, define the field name (such as question) that you want to map to the Other Content sheet. If you want to map a cell named Question A in the Offline Content sheet with a cell named Question 1 in the Other Content sheet, then in the Question A cell in the **Offline Content** sheet, insert the formula as = `"Other Content"!<cell number for Question 1>`. So, if Question 1 in the Other Content sheet is in the B7 cell, then the formula for Item A will be = `"Other Content"!B7`.
2. In the Other Content sheet, define the field value (such as answer to the question) that you want to map to the Offline Content sheet. If you want to map a cell named Answer in the Offline Content sheet with a cell named Response in the Other Content sheet, then in the Response cell in the Other Content sheet, insert the formula as = `'Offline Content'!<cell number for Answer>`. So, if the Answer in the Offline Content sheet is in the B6 cell, the formula for the Response cell in the Other Content sheet will be = `'Offline Content'!B6`.

8. To upload the custom offline response sheet, in the **Import Custom Offline Bid Sheet** page, click **Upload** and select the custom offline response sheet.

   Alternatively, you can drag and drop the custom offline response sheet file to upload it.
9. Click **Import**.

   Excel files of only .xls format are supported for the import of custom offline response sheets.

   > Note
   >
   > If the custom offline response sheet that you import contains errors, the errors are displayed as hyperlinks in the **Import Custom Offline Bid Sheet** page. You can click the hyperlinks to view more information about the errors that occurred. Fix the errors and import the offline response sheet again.

Uploading a Common Custom Offline Response Sheet for a Group of Participants in Guided Sourcing

Use this procedure to upload a common custom offline response sheet for a group of participants.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or a user with project owner capabilities for the event.
- You must have enabled the **Enable custom offline response** rule in the **Set event rules** page of the guided sourcing event. For more information, see Editing Event Rules in Guided Sourcing Events [page 255].
- The sourcing event must have at least one line item or question before you can import a custom offline response sheet.

> Restriction
>
> The .xlsx file format import is not supported for custom offline response sheets. This is in line with the classic SAP Ariba Sourcing.

Context

You can import a common custom offline response sheet for a group of participants. Event participants can use the customized offline response sheets to submit their bid responses based on the event configuration for items and questions.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press Enter or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the *More* icon ( ) in the upper-right corner of the event draft page and select **Import Custom Offline Bid**.

   The **Import Custom Offline Bid Sheet** page opens.
6. Select the **Import Excel and zip files for specific participant's bid sheets** checkbox.
7. To download the custom offline response sheet at the participant level, select the participant-specific custom offline bid sheet link.

   The zip file containing a separate custom offline response sheet for each participant is downloaded.

   > Note
   >
   > In the zip file, the file name of each participant-specific custom offline Excel sheet is in the format <Participant's contact name>+<Participant's organization name>.xls.
   >
   > For example, Jamie+ABC Printing.xlx.
8. Edit your offline response sheet. To define a relationship between your online and offline content, insert Excel formulas in the Offline Content sheet.

   Example 1: You want to define a relationship between the Other Content and the Offline Content sheets to receive item price, then:
   1. In the Offline Content sheet, define the field name (such as item name) that you want to map to the Other Content sheet. If you want to map a cell named Item A in the Offline Content sheet with a cell named Item 1 in the Other Content sheet, then in the Item A cell in the **Offline Content** sheet, insert the formula as = "Other Content"!<cell number for Item 1>. So, if Item 1 in the Other Content sheet is in the B5 cell, then the formula for Item A will be = "Other Content"!B5.
   2. In the Other Content sheet, define the field value (such as item price) that you want to map to the Offline Content sheet. If you want to map values of two cells named Shipping Cost and Packaging Cost in the Offline Content sheet to a cell named Price in the Other Content sheet, where Price value = Shipping Cost value + Packaging Cost value, then in the Price cell in the Other Content sheet, insert the formula as = 'Offline Content'!<cell number for Shipping Cost>+'Offline Content'!<cell number for Packaging Cost>. So, if the Shipping Cost and the Packaging Cost in the Offline Content sheet are

in B4 and C4 cells, respectively, then the formula for the Price cell in the Other Content sheet will be = `'Offline Content'!B4+'Offline Content'!C4`.

Example 2: You want to define a relationship between the Other Content and the Offline Content sheets to receive responses to questions, then:

1. In the Offline Content sheet, define the field name (such as question) that you want to map to the Other Content sheet. If you want to map a cell named Question A in the Offline Content sheet with a cell named Question 1 in the Other Content sheet, then in the Question A cell in the **Offline Content** sheet, insert the formula as = `"Other Content"!<cell number for Question 1>`. So, if Question 1 in the Other Content sheet is in the B7 cell, then the formula for Item A will be = `"Other Content"!B7`.
2. In the Other Content sheet, define the field value (such as answer to the question) that you want to map to the Offline Content sheet. If you want to map a cell named Answer in the Offline Content sheet with a cell named Response in the Other Content sheet, then in the Response cell in the Other Content sheet, insert the formula as = `'Offline Content'!<cell number for Answer>`. So, if the Answer in the Offline Content sheet is in the B6 cell, the formula for the Response cell in the Other Content sheet will be = `'Offline Content'!B6`.

9. Compress all the participant-specific custom offline Excel sheets into a zip file and upload the zip file to the **Import Custom Offline Bid Sheet** page by clicking **Upload** and selecting the file.

   Alternatively, you can drag and drop the zip file containing all the participant-specific custom offline Excel sheets to upload.
10. Click **Import**.

   Excel files of only .xls format are supported for the import of custom offline response sheets.

   > ⓘ Note
   >
   > If the custom offline response sheet that you import contains errors, the errors are displayed as hyperlinks in the **Import Custom Offline Bid Sheet** page. You can click the hyperlinks to view more information about the errors that occurred. Fix the errors and import the offline response sheet again.

Uploading Participant-Specific Custom Offline Response Sheets for Each Participant in Guided Sourcing

Use this procedure to upload participant-specific custom offline response sheets for each participant.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or a user with project owner capabilities for the event.
- You must have enabled the **Enable custom offline response** rule in the **Set event rules** page of the guided sourcing event. For more information, see Editing Event Rules in Guided Sourcing Events [page 255].
- The sourcing event must have at least one line item or question before you can import a custom offline response sheet.

Restriction

The .xlsx file format import is not supported for custom offline response sheets. This is in line with the classic SAP Ariba Sourcing.

Context

You can import a participant-specific custom offline response sheet for each participant. Therefore, when you invite participants to certain items and not others, each can have their own version of the custom offline response sheet. Event participants can use the customized offline response sheets to submit their bid responses based on the event configuration for items and questions.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the *More* icon ( ) in the upper-right corner of the event draft page and select **Import Custom Offline Bid**.

   The **Import Custom Offline Bid Sheet** page opens.

   Note

   The **Import Custom Offline Bid** option is available only if you have configured items or questions to use bid responses from the custom offline response sheet.
6. Select the **Import Excel and zip files for specific participant's bid sheets** checkbox.
7. To download the custom offline response sheet at the participant level, select the participant-specific custom offline bid sheet link.

   The zip file containing a separate custom offline response sheet for each participant is downloaded.

   Note

   In the zip file, the file name of each participant-specific custom offline Excel sheet is in the format `<Participant's contact name>+<Participant's organization name>.xls`.

   For example, `Jamie+ABC Printing.xlx`.
8. Edit the custom offline response sheet. To define a relationship between your online and offline content, insert Excel formulas in the Offline Content sheet.

Example 1: You want to define a relationship between the Other Content and the Offline Content sheets to receive item price, then:

1. In the Offline Content sheet, define the field name (such as item name) that you want to map to the Other Content sheet. If you want to map a cell named Item A in the Offline Content sheet with a cell named Item 1 in the Other Content sheet, then in the Item A cell in the **Offline Content** sheet, insert the formula as = `"Other Content"!<cell number for Item 1>`. So, if Item 1 in the Other Content sheet is in the B5 cell, then the formula for Item A will be = `"Other Content"!B5`.
2. In the Other Content sheet, define the field value (such as item price) that you want to map to the Offline Content sheet. If you want to map values of two cells named Shipping Cost and Packaging Cost in the Offline Content sheet to a cell named Price in the Other Content sheet, where Price value = Shipping Cost value + Packaging Cost value, then in the Price cell in the Other Content sheet, insert the formula as = `'Offline Content'!<cell number for Shipping Cost>+'Offline Content'!<cell number for Packaging Cost>`. So, if the Shipping Cost and the Packaging Cost in the Offline Content sheet are in B4 and C4 cells, respectively, then the formula for the Price cell in the Other Content sheet will be = `'Offline Content'!B4+'Offline Content'!C4`.

Example 2: You want to define a relationship between the Other Content and the Offline Content sheets to receive responses to questions, then:

1. In the Offline Content sheet, define the field name (such as question) that you want to map to the Other Content sheet. If you want to map a cell named Question A in the Offline Content sheet with a cell named Question 1 in the Other Content sheet, then in the Question A cell in the **Offline Content** sheet, insert the formula as = `"Other Content"!<cell number for Question 1>`. So, if Question 1 in the Other Content sheet is in the B7 cell, then the formula for Item A will be = `"Other Content"!B7`.
2. In the Other Content sheet, define the field value (such as answer to the question) that you want to map to the Offline Content sheet. If you want to map a cell named Answer in the Offline Content sheet with a cell named Response in the Other Content sheet, then in the Response cell in the Other Content sheet, insert the formula as = `'Offline Content'!<cell number for Answer>`. So, if the Answer in the Offline Content sheet is in the B6 cell, the formula for the Response cell in the Other Content sheet will be = `'Offline Content'!B6`.

9. To upload a custom offline response sheet for each participant, in the **Import Custom Offline Bid Sheet** page, click **Upload** corresponding to the **Participant Specific Offline Bid Sheet** and select the Excel file.

   Alternatively, you can drag and drop an Excel file to upload it.
10. In the **Select Participants for the Customized Offline Bid** popup, select participants and click **Select**.
11. (optional) To modify participants, perform the following steps:
    a. Click **Modify Participants**.

       Alternatively, click the *Edit* icon ( ) next to the uploaded Excel sheet and then click the **Edit Associated Participants** link.
    b. In the **Select Participants for the Customized Offline Bid** popup, select the participants and click **Select**.
12. Click **Import**.

    Excel files of only .xls format are supported for the import of custom offline response sheets.

> **Note**
>
> If the custom offline response sheet that you import contains errors, the errors are displayed as hyperlinks in the **Import Custom Offline Bid Sheet** page. You can click the hyperlinks to view more information about the errors that occurred. Fix the errors and import the offline response sheet again.

Working with Multi-Round Bidding Events in Guided Sourcing

Multi-round bidding enables you to refine pricing and other information by creating additional bidding rounds in a single event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must use a guided sourcing event template (the **Guided Sourcing Template** template property must be set to **Yes**) with the event rule **Enable multi-round bidding** set to **Yes** or **Delegated**. For more information, see How to configure event templates for guided sourcing in the *Setting up guided sourcing* guide.
- To publish an event with multi-round bidding enabled, the event must contain at least 1 item in the **Items that need quotes** section.

> ⚠ Restriction
>
> - You must enable multi-round bidding before publishing an event. After an event is published, you cannot enable multi-round bidding.
> - Multi-round bidding is supported for RFIs and RFPs but not for auctions.

Context

In a multi-round bidding event, you create each new bidding round in sequence, after a round closes. When you create a new bidding round, you can eliminate participants and items. You can also add participants and add or edit items by editing the event.

You can use email bidding in multi-round bidding [page 465] events.

SAP Ariba also supports multi-stage projects [page 131], which enable you to link together multiple events as predecessor and follow-on events. When you create a follow-on event, you can choose to copy supplier, item, and bid information from the predecessor event.

Procedure

1. Create an event or open an event that hasn't been published. Verify that the template used to create your event has the **Enable multi-round bidding** rule set to **Yes** or **Delegated**:

   Navigate to the event name in the upper left corner of the event page.

   - If you see **Multi-round bidding enabled** below the event name, multi-round bidding is enabled. Continue to the next step.

- If you see an edit icon ( ) and a **Multi-round bidding disabled** link, multi-round bidding is not enabled but the **Enable multi-round bidding** rule is delegated. Select the **Multi-round bidding disabled** link. In the **Bidding rules settings** popup, check **Enable multi-round bidding**. You can also set the **Enable multi-round bidding** rule by clicking the more icon (•••) in the top-right corner of the page and selecting **Set event rules**.
- If you see the text **Multi-round bidding disabled** without an edit icon, the template you used does not have multi-round bidding enabled or delegated. Contact a member of the **Template Creator** group or a user with template creator permissions in your organization and request a template with the **Enable multi-round bidding** rule enabled or delegated.

2. Specify additional information for your event, such as line items, lots, and suppliers. Publish the event. If you open the **Monitor event** page, the top-left side of the page shows **Round** *n*, where *n* is the number of the round.
3. To create a new round of bidding, open the event after bidding closes for the event and before items are awarded (the event is in the **Review responses** state). In the top-right corner of the event page, click the more icon (•••) and select **Create new round**.

   The **Create new round** popup opens.

   a. Specify the end time or duration for the next bidding round using the **Time** or **Duration** button and calendar or time options.

   b. **Optional:** To exclude a supplier from the next round, click the more icon (•••) to the right of a supplier's name and select **Exclude in new round**.

   c. **Optional:** To exclude an item from the new round, click the more icon (•••) to the right of the name of the item and select **Exclude in new round**.

   You can also bulk select items, requirements, attachments, sections, and certain questions when excluding them or including them in a new round of a multi-round bidding event. To exclude all content from the new round, select the check box in the table header and click **Exclude**. This marks all the content as Excluded and removes it from the new round of bidding. When you exclude a section or lot, all items within the section or lot also get marked as excluded. However, if you want to retain some items, you can select them and click **Include**. You can also exclude or include conditional questions.

   > Note
   >
   > - Even if you exclude a section, the prerequisite questions (if any) inside it are not excluded.
   > - If you search for a particular content, the selection of only the latest search result is retained. Any selection made in the previous search is discarded. For example, if you search for Item01 and select it, and then search for Item02 and select it, only Item02 is retained.
   > - You cannot exclude prerequisite questions from any of rounds in a multi-round bidding event.

   d. Click **Done**.

   > Note
   >
   > You can add excluded suppliers and items back into future rounds if you wish.

4. When bidding for each round after the first round closes, opening the event shows the **Review responses** page with a **Rounds summary** panel. You can view either final bids or bids from any of the previous rounds by clicking the Round icon ( ) and choosing the round number. You can sort the bids for each item by clicking the more icon (•••). You can choose whether to sort the bids from lowest highest, or from highest to lowest. .

> ⓘ Note
>
> The suppliers' participation status and bid details are carried forward to the subsequent rounds. The **Supplier participation** chart on the Monitor page displays the cumulative participation status. To see the number of participants that participated in a specific round, see the **Rounds Summary** panel. You can also export the bid history report to check participation details of suppliers. For more information about exporting bid history report, see Creating Excel Event Bid History Reports in Guided Sourcing [page 595].

Next Steps

> ⓘ Note
>
> - To add new items or suppliers for a new round, you must edit the event.
> - After you create a new round, the event appears in **Review responses** state to suppliers you excluded from that round. The event appears in **Open** state to suppliers who are still included. When the included suppliers bid, they don't see items you've excluded from the new round.

Related Information

Email Bidding for Multi-Round Events in Guided Sourcing [page 465]

Using Optimization Scenarios to Award Multi-Round Bidding Events in Guided Sourcing

This procedure describes how to use optimization scenarios to award multi-round bidding events in guided sourcing. For large and complex events where the awarding isn't easy to determine, you can use an optimization scenario. Optimization scenarios help you make award decisions by allowing you to create and compare hypothetical awarding models with goals and specific constraints to determine the potential awarding results.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be in the **Review responses** state (also referred to as the **Pending Selection** state).
- (Optional) To send award scenario information to an external system, the event must be created from a template with the following settings in the **Price Acceptance and Integration Actions** section:
  - **Allow external system integration** is set to **Yes**.

    - The required follow-on documents are specified for **Allow integration types**.
- The template used to create the event must have rollup terms that have ranking order specified.
- You must have either **optimization workbench admin** or **optimization workbench user** permissions to be able to use the bid analysis options in SAP Ariba Sourcing.
- You must ensure that the following parameter is enabled in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution: `Application.ACM.EnableBidAnalysisTab`. See Enable bid analysis tab for buyers in the Intelligent Configuration Manager Parameters Reference guide.
- If your event contains a **Quantity** field, the field must contain an initial value at the event level for optimization scenarios to work correctly. To ensure proper evaluation of optimization scenarios, you can set initial values for the **Quantity** field. (If a supplier changes the **Quantity** to match the quantity they supply, optimization scenarios will still work correctly.)
- You must use a guided sourcing event template with the event rule **Enable multi-round bidding** set to **Yes** or **Delegated**. For more information, see How to configure event templates for guided sourcing in the *Setting up guided sourcing* guide.
- To publish an event with multi-round bidding enabled, the event must contain at least one item in the **Items that need quotes** section.

> ⚠ Restriction
>
> - You must enable multi-round bidding before publishing an event. After an event is published, you cannot enable multi-round bidding.

Context

An optimization scenario consists of:

- A **goal**, such as minimizing the value of the **Total Cost** term for each item.
- Optional **constraints**, such as a minimum or maximum number of suppliers, or only including incumbent suppliers
- Optional **item groups**, or subsets of event items to evaluate. If an optimization scenario has no item groups defined, SAP Ariba Sourcing evaluates all items in the event that contain the term specified in the goal.
  You can use item groups to optimize awards for different subsets of event items. For example, you may have an event with sections for different geographical regions, where each section contains identical items. You can create multiple scenarios, each defining an item group containing a different section so that you can optimize awards per geographical region.

You submit an optimization scenario for evaluation; SAP Ariba Sourcing then determines the appropriate suppliers and awards allocations to best meet the specified goal.

SAP Ariba provides preconfigured optimization scenarios, such as **Best bid**, which allocates 100% of each item to the supplier whose bid has the lowest **Total Cost**. Depending on your site configuration and the event, additional scenarios are available, such as **Incumbent suppliers**, which allocate awards to incumbent suppliers only.

You can also create custom optimization scenarios with a goal and optional constraints and item groups. The scenario goals available when creating custom optimization scenarios are derived from the rollup terms that have ranking order specified in the template.

Custom optimization scenarios in guided sourcing also support the following options:

- The *Bulk auto create* option to create item groups based on event sections and the *Manually create* option to create item groups
- Natural language-based options for defining constraints

Tips:

- Run an optimization 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.
- 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.

> ⚠ Restriction
>
> - Optimization scenarios for multi-round bidding are supported for RFPs and RFIs but not for auctions.
> - Custom optimization scenarios in guided sourcing do not support optimization scenarios that are based on scoring functions that evaluate supplier bids per item.
> - You cannot create a new optimization scenario for guided sourcing events that have more than 100 invited suppliers.

Procedure

1. From any of the following locations, select the multi-round bidding event for which you want to award the lots or line items:
   - **For you** > **Recently viewed**
   - **For you** > **Summary** > **Review responses**
2. Navigate to the **Award scenarios** panel.

   If you have bid analysis enabled, select the **Scenario Maker** tab.

   The **Award scenarios** panel shows cards for existing scenarios, including preconfigured optimization scenarios provided by SAP Ariba, such as **Best Bid**.

   The current scenario is outlined in blue, and values for the current scenario are shown in the table below the cards.
3. Use one of the following methods to create an optimization scenario:

To...	Complete these steps:
Create a new optimization scenario from scratch	1. Select the ⊕ (**Create award scenario**) icon to the right of the scenario cards. 2. In the **Create a scenario** popup, select **Create a new optimization scenario** and click **Done**. ⓘ Note Leave the **Scenario name** field in the **Create a scenario** blank.

To...	Complete these steps:
	3. In the **Scenario objective** panel of the **Create scenario** page, enter a name for the scenario you are creating.
Create a new optimization scenario by copying a scenario	1. Locate the card for the scenario you want to copy. Select the more options icon (•••), then select **Copy**. ⓘ Note The **Copy** option is unavailable if a data update is pending for a scenario. 2. In the **Create a scenario** popup: • Select **Copy an existing scenario**. • Enter a name for the new scenario. • For the **Copy the scenario as** field, select **Optimization scenario**. 3. SAP Ariba creates a new scenario. Locate the card for the scenario you just created. To edit the scenario, select the more options icon (•••), then select **Edit constraints**.

4. In the **Scenario objective** panel of the **Create scenario** or the **Update scenario** page, select a goal from the **What is the goal of your scenario** dropdown.

   Based on the rollup terms that have the ranking order specified in the template, you see various options, such as:

   - **Minimize** *`term`*
   - **Maximize** *`term`*

   Where a *`term`* is any of the rollup terms that have ranking order (**higher is better** or **lower is better**) specified in the event template.
5. (Optional) From the **Item groups** section, click **Create** to create one or more item groups.

   > ⓘ Note
   >
   > This step is optional because some of the constraints are not applicable to item groups. If there are no item groups, SAP Ariba Sourcing evaluates all items in the event that contain the term specified in the goal.

   From the **Create item groups** page that appears, complete the following steps:
   1. From the **Group settings**, select either **Bulk auto create** or **Manually create** and select item groups or items as necessary.
      - The **Bulk auto create** option enables you to create item groups based on the sections to which the items belong. For example, if there are five sections that have multiple items within, five item groups are created by default if you select the top checkbox. However, you can unselect sections for which you do not want to create item groups.
      - The **Manually create** option enables you to manually select items to create a group. All the items you select are added to a single group.
   2. After you select the items or item groups, click **Save** in the top-right corner of the page.
      Create scenario page displays the item groups you created. You can rename the item groups by clicking the *pencil* icon next to the item group in the **Create scenario** page.
6. From the **Define constraints** section, click **Create** and complete the following configuration from the **Create constraints** page:

a. From the **What do you want to do?** dropdown, click the *search* icon, and select any of the following options:
   - **Award [quantity] of [items] to [suppliers]**
   - **Award [percentage] of amount of [items] to [suppliers]**
   - **Award [count] suppliers to [items] from [suppliers]**
   - **Award [quantity] of all items to [suppliers]**

   The entries in square brackets ([]) indicate variables. [items] are replaced by the item groups you select and [suppliers] by suppliers who meet the criteria you specify.
b. From the **Select values to the constraint** options, select:

Amount	Specify the amount (**At least**, **At most**, or **Exact**), in percentage terms, that you want to award.
Item groups	Select one or more item groups to which this constraint applies.
Suppliers	Select one of the following options: • **All suppliers** • **Incumbents** • **Selected suppliers** - if you select this option, you can view the list of all suppliers in the event and select one or more suppliers from the list. • **Suppliers matching criteria** - if you select this option, you can specify the supplier filter criteria such as **RFX answer criteria**, **Term criteria**, or **Profile criteria** from the **Criteria** tab and select from the list of suppliers that appears in the **Matching suppliers** tab. • **Participants bid on all items** - if you select this option, you can view the list of suppliers who have submitted bids for all items in the event and select suppliers from the list.

c. Select the **Save** button on the top-right corner of the page.

   The **Create scenario** or **Update scenario** page displays the constraints.

7. To create a new round, complete the following steps:
   1. Click the *More* actions icon (•••) in the upper-right corner of the event page and select **Event options** › **Create new round**.
   2. In the **Click a new round** page, click **Done**.
   3. The **Additional message (optional)** popup appears.
   4. Click **Create**.
8. To place bids on behalf of participants who are unable to place their own bids, complete the following steps:
   1. In the **Items that need quotes** panel on the *Monitor event* page, click the *More* icon (•••) next to the supplier's name.
   2. Click **Surrogate bid**.
   3. Click your event in the supplier's event list.

4. Navigate to the bid console and enter the participant's bid.
   If the **Require surrogate bid justification** rule is set to **Yes**, a pop-up window opens with a prompt to enter a reason for submitting the surrogate bid.
   Optionally, you can attach a file that supports your reason for placing a surrogate bid. After the bid is submitted, the **Surrogate bid justification** icon ( ) appears below the bid amount. You can view the justification by clicking the **Surrogate bid justification** icon ( ) in the **Items that need quotes** panel on the **Monitor event** page.
5. Click **Submit Entire Response**

   > Note
   >
   > If the **Require surrogate bid justification** rule is set to **Yes**, you must enter a justification for submitting a surrogate bid.

6. In the **Submit this response?** popup, click **OK**.
7. Click **Stop** at the top of the page to stop surrogate bidding and return to your own view of the event.

9. To stop the event, perform the following steps:
   1. Click the *More* actions icon (•••) in the upper-right corner of the event page, and select **Event options** > **Stop event**.
   2. In the **Stop event** popup, click **Stop**.
      In the scenario cards for outdated scenarios, **Update pending** is displayed.
10. To update an outdated scenario with the latest data, perform the following steps:
    1. Locate the card for the scenario you want to update, select the more options icon ( ), then select **Update**.
       The **Edit constraints** popup opens.
    2. Click **Continue**.
       The **Edit scenario** page opens.
11. Review the scenario, and select **Optimize** to submit the scenario for evaluation.
12. **Optional:** Choose **Compare scenario** and select two or more scenarios that you want to compare.

    > Note
    >
    > You can select a maximum of six scenarios for comparison.

    a. After you select the scenarios that you want to compare, choose **Compare scenario**.

       The **Compare scenario** page appears and displays the summary of the selected scenarios.

       The selected scenarios are listed in the top right-hand corner of the page. You can remove any of the scenarios from the comparison by choosing the **x** button next to the scenario name.

       To close the **Compare scenario** page, choose **Cancel**.
13. Choose the scenario you want to award by selecting the corresponding scenario card.
14. Select **Award**.
15. Choose whether to send email notifications to participants who are getting awards and to participants who aren't getting awards.

    You can optionally select **Customize Award Emails** to customize the email notifications. See Event Notification Template Variables [page 576] for descriptions of the variables used in email notifications.

> ⓘ Note
>
> If an awarded supplier is not registered on SAP Business Network, no notification is sent to the supplier until the supplier is registered on SAP Business Network and has an SAP Business Network ID.

16. **Optional:** If the event is configured for integration with an external system, select one of the following options for **Do you want to create follow-on documents?**
    - **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
      Based on the values you specified in the **Allow integration types** field in the guided sourcing event template, the **Integration Type** field in the **Confirm award** dialog box displays the follow-on document type:
      - Only one follow-on document type is displayed for a single award.
      - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

      > ⓘ Note
      >
      > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. When you click **Show Details**, more details are displayed.
    - **No, not now** if you do not want to create a follow-on document based on the award.

    > ⓘ Note
    >
    > The **Do you want to create follow-on documents?** option is not available for events that have the award approval task enabled.
    >
    > The option to create a Purchase Information Report (PIR) document is available only for events created from templates with the rule **Allow users to accept a supplier's price as** set to **Contracted Price**. You cannot create a PIR when this rule is set to **Estimated Price**.
17. Select **Confirm**.

    A success message shows the total savings and the number of items awarded. If you chose to send award information to an external system to create a follow-on document, the message also indicates that the selected follow-on document is created.
18. **Optional:** To send award scenario information to an external system, click **Send prices to external system**.

    The **Send prices to external system** dialog box is displayed.

    Based on the values you specified for the **Allow integration types** drop-down in the guided sourcing event template, the **Integration Type** field in the **Send prices to external system** dialog box displays the follow-on document type:
    - Only one follow-on document type is displayed for a single award.
    - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

    > ⓘ Note
    >
    > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. To display more details, click **Show Details**.

19. Click **Confirm**.

Email Bidding for Multi-Round Events in Guided Sourcing

Email bidding enables you to invite suppliers who are not onboarded to the SAP Business Network to bid on an event. Multi-round bidding enables you to create multiple bidding rounds in a single guided sourcing event.

Prerequisites

- This feature is supported only in the guided sourcing user interface. To use this feature your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group. For more information about enabling guided sourcing, refer Setting Up Guided Sourcing.
- To be able to create a multi-round email bid, you must be the event owner or have project owner capabilities for the event.
- The **Allow participants to submit bids by email** event rule must be set to **Yes**. For more information, refer Allow participants to submit bids by email.
- The **Enable multi-round bidding** event rule must be set to **Yes**. For more information, refer Enable multi-round bidding event.
- To publish an event with multi-round bidding enabled, the event must contain at least 1 item in the **Items that need quotes** section.

> ⚠ Restriction
>
> - Limitations related to multi-round and email bidding apply to this feature. For more information, refer Allow participants to submit bids by email and Working with Multi-Round Bidding Events in Guided Sourcing [page 456]
> - Multi-round email bidding is applicable only to RFI and RFP guided sourcing events.
> - Multi-round email bidding does not support prerequisite questions that have restrictions.
> - Multi-round email bidding does not support events having questions with visibility conditions.
> - The total size of email attachments used in email bidding must not exceed the value entered for the `Application.AQS.EmailBidAttachmentSizeLimit` parameter.

Context

Multi-round email bidding enables suppliers to participate in multi-round bids via emails. Suppliers need not be onboarded to the SAP Business Network to send out emails. Buyers can send out multiple bid invitations to suppliers.

Suppliers receive emails during multi-round bidding with the following options :

- **Email Response** - This option generates a new email for suppliers. Suppliers can then fill in the attached bid sheet and send the email.

- **See Event** - This option allows suppliers to open the SAP Ariba Sourcing event. The recipient must be a registered supplier to sign in to SAP Ariba Sourcing.
- **Decline**- This option allows suppliers to decline participation in the event. Suppliers can, optionally provide a reason for declining to participate in the event and send it in an email. This option is unavailable to the suppliers in the subsequent bid rounds if they have responded to a bid invite.
- **Revise response** - This option, present in the acknowledgment emails that are sent to suppliers when an email bid is submitted successfully and when buyers edit an event, allows suppliers to revise the attached bid sheet and send the updated bid sheet by email.

Emails sent after the first round of a bidding event display the bid-round number in the notation, Round n, where n is the number of the round. This text is appended to the event name.

Procedure

1. Create a guided sourcing event that has multi-round bidding and email bidding enabled. Alternatively, you can edit such an event that is not yet published.
2. Ensure that the **Allow participants to submit bids by email** and **Enable multi-round bidding** event rules are set to **Yes**.

   > ⓘ Note
   >
   > In case these rules are **Hidden**, contact a member of the Template Creator group or a user with template creator permissions in your organization and confirm that the rules are set to **Yes** at the template level. Alternatively, you can request them for a template with the **Allow participants to submit bids by email** and **Enable multi-round bidding event rules** set to **Yes** or **Delegated**.

3. Add the necessary information for your event, such as line items, lots, and suppliers. Publish the event.
4. After you publish a multi-round event, SAP Ariba sends an invitation email to participants. This email contains bidder agreement, bid sheet, and any other attachments.
5. Suppliers can then:
   a. Submit a response by clicking **Email response**. A draft email message opens, with the destination email address and subject line already populated. The message body contains questions and terms for which the recipient can provide responses.
   b. Decline to participate by clicking **Decline**. A draft email message opens, with the destination email address and subject line already populated. The supplier can type a reason for declining to participate and send the response. The supplier's response is shown in the **Messages** tab for the event and the event owner's notifications. This button is not available in subsequent bid rounds if the supplier has responded to a bid invite.

      > ⓘ Note
      >
      > When the **Allow participants to decline participation in events after accepting agreement** rule is set to **Yes**, suppliers can decline participation in guided sourcing events even after the agreement is accepted.

   c. Open the event in SAP Ariba Sourcing by clicking **See event** link. The recipient must be a registered supplier to sign in to SAP Ariba Sourcing.
6. After submitting the email response, suppliers will receive a email notification with **Revise Response** and **See event buttons**. Suppliers can choose to update the attached bid sheet and send it by email.

Alternatively, suppliers might receive an email notification if their bids are rejected after which they are eliminated from further bid rounds.

7. You can also choose to edit a published event during a bid round. You can modify line items or suppliers in the event.
   - If you add new suppliers by editing an event, then existing suppliers will receive an email notification with **Revise Response** button after you edit the event. At the same time, newly added suppliers will receive a new bid invite with **Email Response** and **Decline** buttons.
   - If you add new items by editing an event, then the **Intend to Respond** field in the bid sheet, for the new line item, can be updated by the suppliers. **Intend to Respond** fields for line items that were already bid on cannot be updated.
8. To create a new round of bidding, open the event after bidding closes for the event and before items are awarded (the event is in the *Review responses* state). In the top-right corner of the event page, click the more icon (•••) and select **Create new round**. Enter the necessary information.

   > ⓘ Note
   >
   > - You can exclude a supplier or an item from the new round by clicking the more icon (•••) to the right of the supplier's name or the item name and selecting **Remove in new round** for suppliers or **Exclude from new round** for items.
   > - You can include a previously excluded supplier or an item from the new round by clicking the more icon (•••) to the right of the supplier's name or the item name and selecting **Invite to new round** for suppliers or **Add to new round** for items.
   > - Items that are excluded in the current round will not be available in the bid sheet of the next round.
   > - If you include new items to the next round of an event, then the **Intend to Respond** fields in the bid sheet, for those line items, can be updated by the suppliers. The **Intend to Respond** field can only be updated if the included line items were not already bid on.

   A new email invitation is sent to suppliers informing them of the new round.
9. When bidding for each round, after the first round, closes, opening the event shows the **Review responses** page with a **Rounds summary** panel. You can view either final bids or bids from any of the previous rounds by clicking the Round icon ( ) and choosing the round number.

Related Information

Working with Multi-Round Bidding Events in Guided Sourcing [page 456]
Email Bidding in Guided Sourcing Events [page 445]

Supplier-Added Items in Guided Sourcing Events

You can create guided sourcing events that allow suppliers to 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.

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 in addition to the alternative 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 service hierarchies.

> ⓘ Note
>
> The attachment can be in any format. Guided sourcing does not create child items or a service hierarchy from the attachment.

Event Rules Related to Supplier-Added Items [page 468]

Supplier-Added Items Workflow [page 469]

Creating Guided Sourcing Events That Allow Supplier-Added Items [page 470]

Event Rules Related to Supplier-Added Items

The supplier-added items feature is controlled by event rules. If you want to allow suppliers (participants) to add content to their bids, you need to enable related rules in a guided sourcing template or on the **Set event rules** page for a guided sourcing event.

The following table describes the event rules related to supplier-added items:

Rule	Description	Remarks
Allow suppliers to add items	Determines whether suppliers can add line items and lots to a guided sourcing event.	Choose **Yes** if you want to allow suppliers to add bid content. The event rules **Maximum supplier-added items for each supplier** and **Allow supplier-added items only in alternative bids** are available when **Allow suppliers to add items** is set to **Yes**.
Maximum supplier-added items for each supplier	Determines the maximum number of items a supplier can add in a guided sourcing event.	This rule is available only when **Allow suppliers to add items** is set to **Yes**. The value ranges from 0 to 20.
Allow supplier-added items only in alternative bids	Determines whether suppliers can add line items and lots to primary bids.	If the **Allow supplier to add items** and **Can participants create alternative responses?** event rules are set to **Yes**, you can also use the **Allow supplier-added items only in alternative bids** rule to restrict suppliers from bidding on supplier-added items in primary bids.

Parent topic: Supplier-Added Items in Guided Sourcing Events [page 467]

Related Information

[Supplier-Added Items Workflow [page 469]]
[Creating Guided Sourcing Events That Allow Supplier-Added Items [page 470]]

Supplier-Added Items Workflow

1. A template author (user with **Template Creator** capabilities) creates or updates a guided sourcing event template by setting or delegating the following event rules:
   - **Allow suppliers to add items**
   - **Maximum supplier-added items for each supplier**
   - **Allow supplier-added items only in alternative bids**

   If **Allow supplier-added items only in alternative bids** rule is set to **Yes**, the rule **Can participants create alternative responses?** must also be set to **Yes**.
2. The template author adds the following definitions:
   - **Supplier Line Item**
     Enables a supplier to add a line item to an event.
     If you do not create a **Supplier Line Item** definition prototype, supplier-added line items use the buyer **Line Item** definition. If you create a **Supplier Line Item** definition prototype, supplier-added items can have terms that are different from those of buyer-added items. By default, the **Supplier Line Item** prototype 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 for terms such as **Price** and **Quantity**, the term option **Is term editable in alternatives** must be set to **Editable By Owner and Participant**.

   - **Supplier Item with Child Items or Service Hierarchy**
     Enables a supplier to add an item with an attachment that can describe child items or a service hierarchy.
     If you do not create a **Supplier Item with Child Items or Service Hierarchy** definition prototype, 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.
     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 prototype includes the **Extended Price** and **Child items or service hierarchy document** (Attachment) terms.
     The **Child items or service hierarchy document** term enables suppliers to upload an attachment that describes the child items. The type and format of the attachment file is unrestricted. Guided sourcing does not process the file or attempt to create child items or a service hierarchy from the file.

     > Note
     >
     > The **Child items or service hierarchy document** term cannot be deleted.
3. The template author publishes the template.
4. A user (the event owner) creates an event from the template.
5. If the rules mentioned in the first step were delegated, the event owner sets values for these rules.

6. The event owner adds items and suppliers to the event and publishes the event.
   The event opens for responses.
7. A supplier views the event. On the **Select Lots** page, they add items by clicking **Add New Lot**. If a **Supplier Item with Child Items or Service Hierarchy** prototype 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 a service hierarchy.
8. The supplier submits their primary bid. If the **Allow supplier-added items only in alternative bids** rule was set to **No**, the primary bid can include supplier-added items.
9. If the **Allow supplier-added items only in alternative bids** rule was set to **Yes**, the supplier creates an alternative bid with responses to supplier-added items.
10. When the event owner creates award scenarios, they can only award supplier-added items to the supplier that added them.

Parent topic: Supplier-Added Items in Guided Sourcing Events [page 467]

Related Information

Event Rules Related to Supplier-Added Items [page 468]
Creating Guided Sourcing Events That Allow Supplier-Added Items [page 470]

Creating Guided Sourcing Events That Allow Supplier-Added Items

Use this procedure to create guided sourcing events that allow suppliers to add items and lots and to bid on them.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group to create a guided sourcing project or event.
- You must be the event owner or have project owner capabilities for the event.

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.

The event rules you can set and view on the **Set event rules** page depends on how rules are delegated in the template used to create your event.

Procedure

1. Create a guided sourcing project using a template that is configured for supplier-added items.
2. On the guided sourcing interface, click the more action icon (•••) in the upper-right corner, and select **Event settings** > **Set event rules**.
3. On the **Set event rules** page, select the **Allow suppliers to add items** bidding rule if it is available but not selected.
4. Enter a value for **Maximum supplier-added items for each supplier**.
5. **Optional:** To restrict suppliers from adding items to primary bids, select the following event rules:
   - **Can participants create alternative responses?**
   - **Allow supplier-added items only in alternative bids**
6. On the **Event duration** panel, set the event start and end time.
7. On the **Suppliers** panel, invite participants to the sourcing event.
8. On the **Items that need quotes** panel, add lots and items to the event.
9. **Optional:** If you're creating an event that also allows alternative bids, configure options for alternative bids [page 440].
10. 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 both primary and alternative bids; if this rule was set to **Yes**, suppliers can add items and lots only in alternative bids.

Task overview: Supplier-Added Items in Guided Sourcing Events [page 467]

Related Information

Event Rules Related to Supplier-Added Items [page 468]
Supplier-Added Items Workflow [page 469]

Event Content Translation in Guided Sourcing

Buyers can add parts of event content in additional languages so that team members and suppliers from different locales can view event content in their preferred language.

Single-event guided sourcing projects have several fields that can be translatable into different languages. In guided sourcing, buyers can add translations to the following:

- Single-event sourcing projects (including single-events created in full projects)
- Templates used for creating single-event sourcing projects

Translations can be added in the following languages:

- Bulgarian
- Brazilian Portuguese
- Croatian
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Romanian
- Russian
- Simplified Chinese
- Spanish
- Swedish
- Thai
- Turkish

> Note
>
> The availability of supported languages may vary based on the site configuration.

Translations can be added only to a selected list of supported fields. Such fields have a clickable link **Translations** associated with them. The following table provides more details about the fields that support translation:

Screen	Section	Translatable Fields
Event draft		Event title
Event draft	**Event Information** ⓘ Note By default, this section appears collapsed. Click the ⌄ *(Click or press enter to show event information)* button to expand the section.	**Description**
Add section	**Information and rules**	• **Name** • **Description**
Add item	**Information and rules**	• **Name** • **Description**
Add question	**Information and rules**	• **Question**
Add Attachment		**Name**
Add term		**Name**
Add formula		**Name**

Important points to note:

- If translations are not available in the preferred language of the user, the event information is displayed in the base language of the sourcing event. To verify the language settings, users can select the profile icon and go to **Preferences** > **Change default locale and currency**.
- Translations can be added at the template level or the event level.

  > Example
  >
  > If a template selected for a sourcing event has translations available in the preferred language of a user working on the event, the user is able to see the translated content in the event.
- Material master data retrieved from an external system is not translatable and is shown as read-only.

  Adding Translations to Guided Sourcing Events [page 474]

  Adding Bulk Translations to Event Content in Guided Sourcing [page 475]

Adding Translations to Guided Sourcing Events

Buyer users can use this procedure to add multilingual support to a guided sourcing event by translating parts of the event content in additional languages.

Prerequisites

To be able to add or modify translations in the sourcing event, you must be a member of the **Translator** group.

Context

Translating event content in additional languages enables participants and team members from different locales to view translations in their preferred languages.

> ⚠ Restriction
>
> Only single-event projects (including single-events created in full projects) support event content translation.

Procedure

1. Edit the sourcing event to which you want to add translations.

   The sourcing event is opened in edit mode where you can see all the translatable fields.
2. To add translations to a field, click the **Translations** link associated with it.

   To add translations to the event title, click on the existing title and select the **Translations** link associated with it.
3. On the resultant popup, you can see the field value in the base language and placeholders for translations in additional languages. Enter the translations in the placeholders for the languages of your choice.

   > ⓘ Note
   >
   > - You can change the base language content if necessary.
   > - You don't have to enter translations for all available languages.
4. Save your changes.

   To apply changes to the event title, click **Done**.

Results

When localized users sign in, the translated event content is displayed in their preferred language. Otherwise, the event content is displayed in the base language of the event.

Task overview: Event Content Translation in Guided Sourcing [page 472]

Related Information

Adding Bulk Translations to Event Content in Guided Sourcing [page 475]

Adding Bulk Translations to Event Content in Guided Sourcing

Use this procedure to add translations to multiple fields simultaneously in single-event sourcing projects.

Prerequisites

To be able to add or modify translations in the sourcing event, you must be a member of the **Translator** group.

Context

Buyer users can add translations for the event content to enable team members and suppliers from different locales to view the event content in their preferred language.

In single-event guided sourcing projects, you can add or modify translations to multiple fields simultaneously in any three supported languages for multiple fields of a sourcing event. The procedure can be repeated to add translations for more languages.

> Note
>
> **Important points to note**:
>
> - If translations are not available in the preferred language of a user, the event content is displayed to the user in the base language of the sourcing event.
> - Translations can be added at the template level or the event level.
>
> > Example
> >
> > If a template selected for a sourcing event has translations available in the preferred language of a user working on the event, the event content is displayed in the preferred language of the user by default.

- Material master data retrieved from an external system isn't translatable and shown as read-only.

> ⚠ Restriction
>
> Translations can be added only to single-event projects (including single-event projects created in full projects).

Procedure

1. Open the guided sourcing project draft where you want to add translations.
2. Click ••• *(More actions)* and select **Event settings** > **Set event translations**.
3. On the **Event Translations** screen, select the languages in which the event content is to be translated.

   The content in the base language is shown read-only.

   You can select a maximum of three languages at a time. If you want to add translations in more than three languages, you must add the content in batches of not more than three languages.

   If a field has translations present already, as a result of the content carried over from the template used in the sourcing project, they're shown against the field in the placeholder of the respective language.
4. Enter translations against the required fields shown in the list.

   The fields are grouped into corresponding sections of the sourcing event. For example, a translatable field in a question is listed under the **Questions** section.

   The sections are paginated depending on the number of translatable fields present in each section.

   Fields that have response type as **Text** are not available for bulk translation and are excluded from the list.
5. Save your changes.

   If you want to discard the changes and revert to the previous values, select **Cancel**.

Results

You've successfully added bulk translations to the sourcing project.

Next Steps

You can follow the same procedure to modify existing translations in bulk.

Task overview: Event Content Translation in Guided Sourcing [page 472]

Related Information

Adding Translations to Guided Sourcing Events [page 474]

Managing Event Tasks in Guided Sourcing

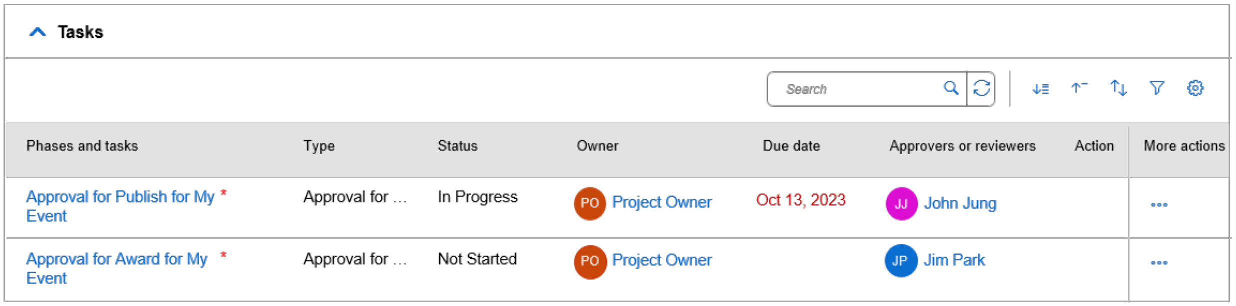
Guided sourcing events can contain tasks that are supported only for events..

Guided sourcing provides the following tasks exclusively for events (event-only tasks):

- **Approval for Publish**: This task prevents event contents from being published until the contents are approved. If present, this task automatically starts when a team member submits an event for publishing.
- **Approval for Award**: This task prevents an award from being created until the award scenario is approved. If present, this task automatically starts when a team member submits a scenario for an award.
- **Review for Team Grading**: This task is available only in events with team grading enabled (events with the **Enable scoring on participant responses** event rule enabled). The **Review for Team Grading** task allows team graders to review the supplier responses to event questions and submit their grades. If present, this task automatically starts when an event changes to the **Review responses** state and the review flow contains reviewers.
- **Approval for Team Grading**: This task is available only in events with team grading enabled and that contain a **Review for Team Grading** task. The **Approval for Team Grading** task allows grade approvers to approve or deny grades assigned by team graders. If present, this task automatically starts when when the **Review for Team Grading task** is completed.
- **Approval for Timing Change**: This task prevents changes in the timing of guided sourcing events from taking effect until the changes are reviewed and approved by authorized persons (including both internal and external approvers). If present, this task automatically starts when an event owner or any other user with privileges to edit the event performs an action to change the timing of the event. Actions that trigger the **Approval for Timing Change** task include the following:
    - Extend the event time.
    - Reduce the event time.
    - Stop an event.
    - Reopen an event.
    - Pause an event.
    - Resume an event.
    - Close an event.
    - Cancel an event.

For events in single-event projects, event-only tasks can be configured only in the event template; the **Approval for Timing Change** task is added using the **Enable approval for event timing change** event rule. For events in a full sourcing project, **Approval for Publish**, **Approval for Team Grading**, and **Approval for Timing Change** tasks can be configured only in the project template, but users can manually add **Approval for Award** and **Review for Team Grading** tasks for an event from the full project.

If an event has an approval or review task, the event page contains a **Tasks** panel similar to the following, from which you can open tasks, view the approval flow, approval or deny tasks, and make limited changes. If you're the active (current) approver, the **Action** column contains buttons to approve or reject (deny) the event or award.



You can also select toolbar icons to alter the table view, as applicable:

To perform this action	Select this icon
Expand phases.	
Collapse phases.	
Sort tasks. For example, you can sort tasks by **Due date** in **Ascending** order.	
Create one or more filtering statements that include or exclude tasks based on column values. For example, you can show only tasks with the status **Not Started**.	When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Choose columns to show or hide.	

Related Information

Tasks in Guided Sourcing Projects [page 182]

Approval for Event Timing Change Task

For a guided sourcing event with an **Approval For Publish** task, edits in the event content are submitted to the event publish approvers for approval. However, edits in the timing of the event are an exception. When the event owner or any other user with privileges to edit the event modified the timing of the event, for example, reducing or extending the event duration, the edits are not sent to approvers for review and the event is published directly.

The **Approval for Timing Change** task makes sure that edits in the event timing also get reviewed and approved. With this task configured, changes in the timing of guided sourcing events won't take effect until the changes are reviewed and approved by authorized persons (including both internal and external approvers).

When an event owner or any other user with privileges to edit the event performs an action specified in the **Actions that trigger approval for event timing change** rule, the **Approval for Timing Change** task automatically starts. The task approvers receive an email notification, and the event enters the pending approval state. The task approvers can review the edited event timing and choose to approve or reject the timing change by using one of the following options:

- Access the guided sourcing dashboard and review the event from the **Feeds** or **My Tasks** panel.
- Access the link in the email. The task approvers are directed to the guided sourcing user interface, where they can review the event changes from the **Feeds** or **My Tasks** panel.
- Use the `External Approval API for Sourcing and Supplier Management`, if the **Approval for Timing Change** task has the **External System Approval** setting set to **Yes** and you are an external approver for the task.

The **Approval for Timing Change** task is supported in RFP and RFI events in both guided sourcing single-event and full projects, as well as RFP and RFI events created from document choice documents. To include an **Approval for Timing Change** task in a guided sourcing event, you must create the event from a template that is preconfigured with that task.

To make the **Approval for Timing Change** task available in the event template, the **Enable approval for event timing change** event rule must be set to **Yes** and **Actions that trigger approval for event timing change** must be specified in the **Timing Rules** section of the event template.

> ⓘ Note
>
> - The **Approval for Timing Change** task has no dependency on the **Approval For Publish** task. You can add the **Approval for Timing Change** task to guided sourcing events with or without adding the **Approval For Publish** task.
> - An event timing change does not create a new version of the event. Timing change approvers can view the timing changes on the **Task details** page of the **Approval for Timing Change** task.
> - If the event status changes or the time specified in the **Approval for Timing Change** task is passed before the task is approved, guided sourcing automatically withdraws this task and sends an email notification to the task submitter and approvers to inform them that the task has been withdrawn.
> - A full sourcing project can't be marked as Complete if it has an ongoing **Approval for Timing Change** task.
> - If an event has an ongoing **Approval for Timing Change** task, no new timing edit is allowed before the task is completed.
> - If an event has an ongoing **Approval for Timing Change** task, the event can't be awarded before the task is completed.

Adding an Approval Task for Timing Changes in Guided Sourcing Events

You can configure the **Approval for Timing Change** task to require approvals for timing changes in guided sourcing events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

- You must be the event owner or have project owner capabilities for the event.
- 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.
- The **Enable approval for event timing change** event rule must be set to **Yes** and **Actions that trigger approval for event timing change** must be specified in the **Timing Rules** section of the guided sourcing event template.
- To allow approvers of the **Approval for Timing Change** task to approve or reject changes in the timing of a guided sourcing event from the email notification that they receive, you must set the ICM parameter `Application.Base.EmailApprovalEnabled` to **Yes** in the **Manage** > **Administration** > **Customization Manager** page of the SAP Ariba Sourcing solution.
- To allow external approvers to approve the **Approval for Timing Change** task, the **External System Approval** setting for the task must be set to **Yes**. Refer to External Approvals for Project Approval Tasks Setup.
- By default, the **Must participants improve their bids** event rule is set to **Yes** in the template for RFP and RFI events. To edit the timing of an RFP or RFI event, you must change the **Must participants improve their bids** event rule to **No**. If you don't change the **Must participants improve their bids** event rule to **No**, then you must have the **Sourcing Project Administrator** role.

Context

The **Approval for Timing Change** task prevents changes in the timing of guided sourcing events from taking effect until the changes are reviewed and approved by authorized persons (including both internal and external approvers). If present, this task automatically starts when an event owner or any other user with privileges to edit the event performs an action to change the timing of the event. Actions that trigger the **Approval for Timing Change** task include:

- Extend the event time.
- Reduce the event time.
- Stop an event.
- Reopen an event.
- Pause an event.
- Resume an event.
- Close an event.
- Cancel an event.

Procedure

1. On the dashboard, click **Manage** > **Templates**.
2. Create or choose an existing guided sourcing template. 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**.
3. Navigate to the **Documents** tab or area on the **Templates** page, click the name of the event and select **Create New Task** > **Approval for Timing Change**.
4. On the task page, enter the following:

- Enter a title for the approval task in the **Title** field.
- Add approvers in the editable **Approvers** field. Also select an **Approval Rule Flow Type**. For more information, refer to the Approval, Review, and Negotiation Flows section in the *Managing projects, teams, documents, and tasks guide*.
- Specify any other options for the task.

5. Click **OK**.
6. Navigate to the **Overview** tab. Click **Actions** > **Template** > **Publish**.

Results

The task you created is added to all events created from the template.

Publishing a Guided Sourcing Event

After you've added suppliers to your event and added content, you can use this procedure to publish your event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- To publish guided sourcing events with locked supplier users, the parameter `Application.AQS.RFX.AllowLockedSuppliersWhenPublishing` must be set to **Yes**.

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

Procedure

1. Open an unpublished event.
2. **Optional:** Preview the event contents as suppliers (participants) will see them.
   a. Go to the **Suppliers** table. Click the more icon (⋯) next to a supplier name and select **Preview as supplier**.

      The event contents for the selected supplier are shown.
   b. When you are done previewing the contents as the supplier, click **End Preview** in the upper-left corner.
3. Click the **Publish** or **Submit** button in the upper-right corner of the event.

   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.

   After you click **Publish** or **Submit**, SAP Ariba checks the event for required term fields. If a term has no value for a required field, an error message is displayed in the table entry for the term.

   When the parameter `Application.AQS.RFX.AllowLockedSuppliersWhenPublishing` is set to **Yes**, guided sourcing events can be published with locked supplier users. When this parameter is enabled, and you try to publish an event that has locked supplier user accounts, a popup appears. The popup displays a warning message about the locked supplier user accounts and the suggested actions to unlock these supplier accounts. To publish the event, click **OK** in the popup.

Results

When your event is published, email notifications about the event are sent to the suppliers (participants) you invited. 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.

About Editing Published Guided Sourcing Events

You can edit a published guided sourcing event, for example, you can invite another supplier, create or change a line item, or add another team member. When you edit a published guided sourcing event, the system creates a draft version of the event.

To edit a published guided sourcing event, select **Event options** > **Edit event** from the more icon (...) of the guided sourcing event in the monitor state.

Viewing Guided Sourcing Event Changes

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 can view the draft or published version of the event in the guided sourcing user interface. You can also view a summary of changes of the event and draft event changes in the guided sourcing user interface.

View the event changes by using the following options that are available for a guided sourcing event in the more icon (...):

View change history	This option is displayed for all versions of the guided sourcing event. You can use the option to view a summary of changes of an event. You can select any of the event versions displayed and click **View changes** to view the specific changes to the event.
View published version	This option is displayed for guided sourcing events in the **Pending Publish Approval** state. You can use the option to view the latest published version of the event. **Note** This option is available only if a published version of the event exists.
View draft changes	This option is displayed for guided sourcing events in the **Pending Publish Approval** state. You can use the option to view the latest changes to the event. **Note** This option is available only if a draft version of the event exists.

View draft version	This option is displayed for guided sourcing events in the **Published** state. You can use the option to view the latest draft version of the event. ⓘ Note This option is available only if a draft version of the event exists.

Viewing Changes Between the Current and Previous Published Verisons

If a guided sourcing event is created using a guided sourcing template configured with an **Approval For Publish** task, upon submitting the event, the **Approval For Publish** task is triggered and the event is sent to the event publish approvers (includes internal approvers and external approvers) for an approval. Event publish approvers can review the event and choose to approve or reject the event. For more information about creating guided sourcing events with an **Approval For Publish** task, see How to require approvals for event contents or award scenarios (Approval For Publish and Approval For Award tasks) and Approval Tasks in Guided Sourcing Full Projects [page 216].

The guided sourcing event you create must meet the following requirements:

- You must use sourcing event template which is preconfigured with an **Approval For Publish** task for the guided sourcing event. For an RFP or auction template to be available in guided sourcing, you must set the **Guided Sourcing Template** template property to **Yes**. For more information, see How to configure event templates for guided sourcing in the *Setting up guided sourcing* guide.
- You must have configured the **Approval For Publish** task of the guided sourcing event with:
    - the required event publish approvers (internal or external)

        > ⓘ Note
        >
        > Adding a minimum of one event publish approver to the **Approval For Publish** task is mandatory.

    - the **Repeat for Each Document Draft** property must be set to **Yes**
- To allow event publish approvers to approve or reject an event from the email notification that they receive, you must set the following parameter to **Yes** in the **Manage** > **Administration** > **Customization Manager** page of the SAP Ariba Sourcing solution: `Application.Base.EmailApprovalEnabled`

When you create a new version of a published guided sourcing event which is configured with an **Approval For Publish** task, upon submitting the event, the **Approval For Publish** task is initiated and the event publish approvers (includes internal approvers and external approvers) are notified through an email. The email notification will contain a link along with a Microsoft Word document as an attachment. The attachment provides a summary of changes between the current and previous published versions of the event.

Event publish approvers can:

- view a summary of changes between the current and previous published versions of the event from the approval email that they receive when buyers submit an event for approval.

- view the event changes in the guided sourcing user interface by using the **View change history**, **View published version**, **View draft changes**, and **View draft version** options that are available for a guided sourcing event in the more icon (...).

> **Note**
>
> Buyers can view the specific changes to the event in the **Update Event** > **Change history** tab when they submit an event for approval.

- review the edited event content and choose to approve or reject the event publish by using one of the following options:
  - Access the guided sourcing dashboard and review the event from the **Feeds** or **My Tasks** panel.
  - Access the link in the email; event publish approvers are directed to the guided sourcing user interface, where they can review the event changes from the **Feeds** or **My Tasks** panel.
  - Open the Microsoft Word document to review the event changes.

Guided Sourcing Event Monitoring

After you publish your event, you monitor it to see how many suppliers have bid, when the event ends, and how many items have been bid on.

When an event is in the monitor phase, you can also:

- Pause and resume the event
- Extend or reduce timing of the event
- Cancel or close the event
- Edit the event contents (you can choose to notify participants and keep or discard existing responses when you publish the changes)

> Note
>
> If the **Prevent project owners from discarding supplier responses while updating events in Guided Sourcing** rule is set to **Yes** in the guided sourcing events template, project owners are prevented from discarding supplier responses while updating guided sourcing events. For more information, refer to Prevent project owners from discarding supplier responses while updating events in Guided Sourcing.

- Communicate with event participants
- Submit surrogate bids
- Lock participants out of the event
- Resend invitation emails
- Download bid reports and supplier attachments

Monitoring Page for Guided Sourcing Events

After you publish your event, you can use the monitoring page to see how many suppliers have bid, when the event ends, and how many items have been bid on.

The monitoring page consists of 3 event related information panels: **Monitor event**, **Items that need quotes**, and **Questions, requirements, and attachments**. Each panel enables you to monitor and take actions on specific areas of your event.

You can use the monitoring page to do the following:

- Pause and resume the event
- Extend or reduce timing of the event
- Cancel or close the event
- Edit the event contents (you can choose to notify participants and keep or discard existing responses when you publish the changes)

> ⓘ Note
>
> If the **Prevent project owners from discarding supplier responses while updating events in Guided Sourcing** rule is set to **Yes** in the guided sourcing events template, project owners are prevented from discarding supplier responses while updating guided sourcing events. For more information, refer to Prevent project owners from discarding supplier responses while updating events in Guided Sourcing.

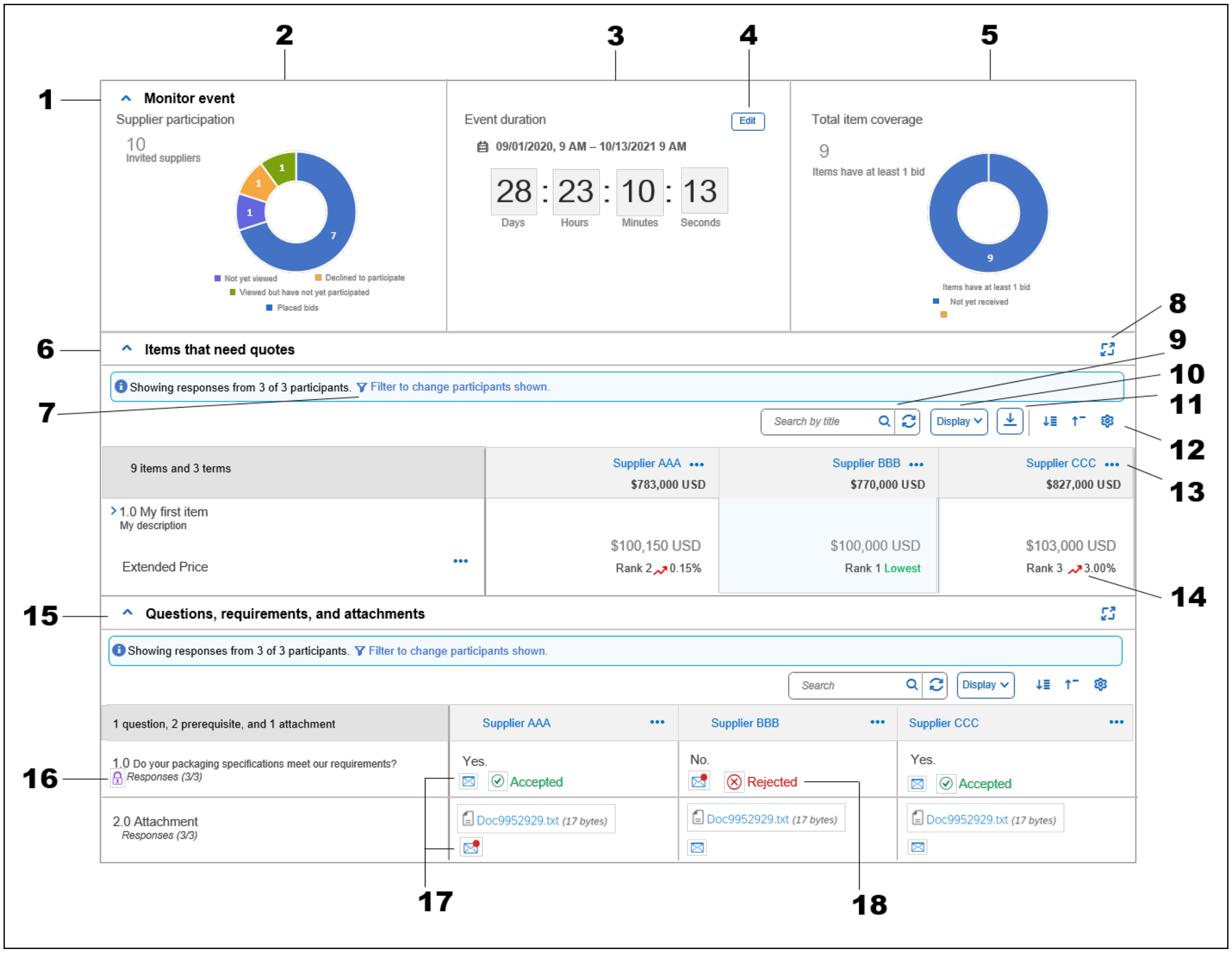
- Communicate with event participants
- Submit surrogate bids
- Lock participants out of the event
- Resend invitation emails
- Download bid reports and supplier attachments

In addition to the monitoring page, you can view key milestones and information about your events in the guided sourcing feed on the For You dashboard. Feed cards alert you when key activities occur in events in your area of interest; for example, a sourcing event is created or has been published, suppliers have bid, suppliers intend to participate or decline to participate, and an event is closing soon.

For more information about the guided sourcing feed, see . The Guided Sourcing Feed [page 58].

> ⓘ Note
>
> The guided sourcing user interface is undergoing several changes. For more details, see Ongoing User Interface Updates for Guided Sourcing.

Using the Monitoring Page



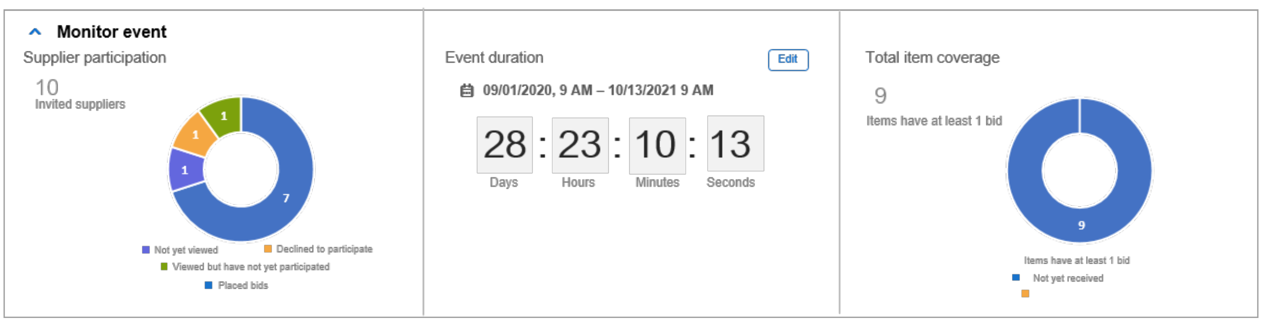
1. The **Monitor event** panel.
2. Summary of the supplier participation status for the event. Quickly see where participants are in the bidding process.
3. Time remaining in the event's current phase.
4. Click **Edit** to extend or reduce the time remaining in the event.
5. Summary of items that have and have not received bids.
6. The **Items that need quotes** panel.
   When suppliers include a comment with their response, a comment icon appears next to the supplier response. Click the comment icon to open the **View comments and attachments** popup.
7. Open filter popup to select which suppliers to show responses from.
8. Expand panels to view full screen.
9. Search for items based on **Name** and **Description** fields.
10. Switch to scorecard display. Only present in events with grading and scoring enabled (the event rule **Enable scoring on participant responses** is set to **Yes**).
11. Download participant responses.
12. Icons to modify the table display:
    - Expand all hierarchical entries

- Collapse all hierarchical entries
- **Columns**: Show or hide columns and change column order. Because participant responses are organized by column, you can use the **Columns** icon as another method to select the participants that you want to show responses for.
- If this is a multi-currency event, you'll also see the icon to change the currency shown in responses:

13. Supplier actions menu. The options available are based on your capabilities and event options and can include locking out the supplier for this event, marking the supplier as excluded (for filtering), and placing a surrogate bid on behalf of the supplier.
14. Bidder rank, with percentage above best bid next to red arrow.
15. The **Questions, requirements, and attachments** panel.
16. Participation gate icon indicates prerequisite questions that act as an access gate question.
17. Comment icon to send comments to participants about their responses.
18. If owner review of a response is required, you can accept or reject participant responses directly in the **Questions, requirements, and attachments** panel.

The Monitor event panel

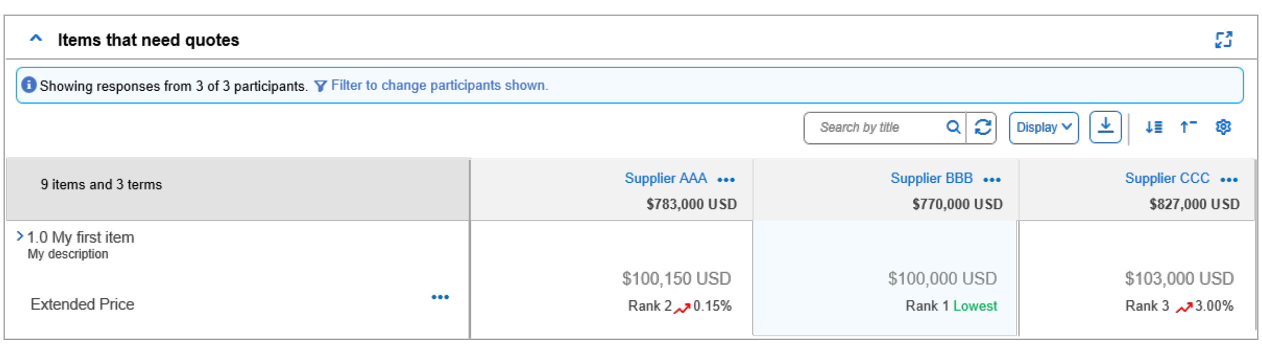
The **Monitor event** panel shows you a summary of the event you're monitoring, including information about supplier participation, event timing, and item coverage:



The **Monitor event** panel displays when you click **Summary** under the event name. The **Event duration** area in the **Monitor event** panel shows the time remaining in the event's current phase. If you have permission, you can click **Edit** to extend or reduce the time remaining.

The Items that need quotes panel

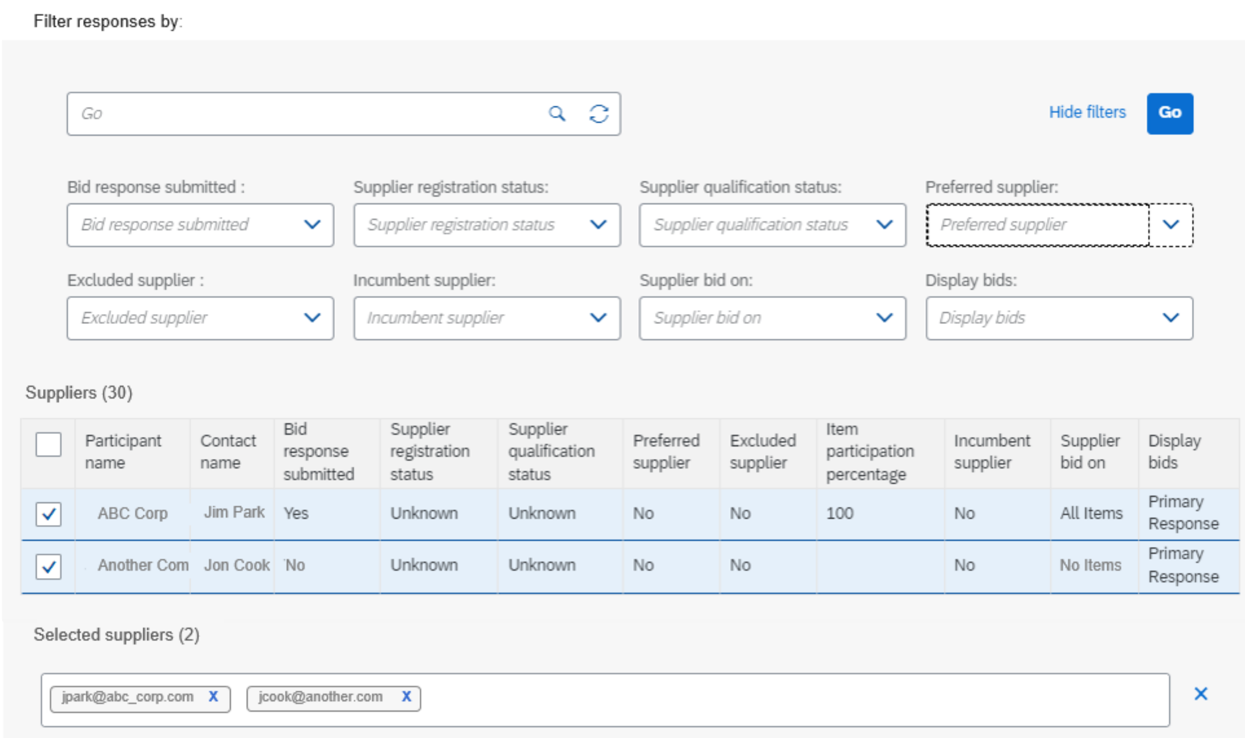
The **Items that need quotes** panel shows you items, terms, suppliers, and participant response values:



You can filter, sort, organize, and search supplier responses. You can also use the **Items that need quotes** panel to submit surrogate bids, resend invitation emails, lock participants, download bid reports, and download supplier attachments.

By default, the **Items that need quotes** panel can show the responses from up to 20 participants, as specified by the **Maximum suppliers for item responses table in guided sourcing monitor page** (`Application.AQS.RFX.MaxDisplaySuppliersGSInItemTable`) parameter. An administrator for your site can change the value of this parameter using the Intelligent Configuration Manager; the maximum value is 40 (show the responses from up to 40 participants).

The filter icon in the blue banner at the top of the page opens a popup for filtering the columns with participant responses. Click **Show filters** to open filter fields:



You can use the following filters to select participants:

- **Bid response submitted**
- **Incumbent supplier**
- **Excluded supplier**
- **Supplier bid on**

In events with alternative bidding, you can also use the **Display bids** filter to select primary responses, alternate responses, or both.

On sites with SAP Ariba Supplier Management solutions, you can also use the following filters:

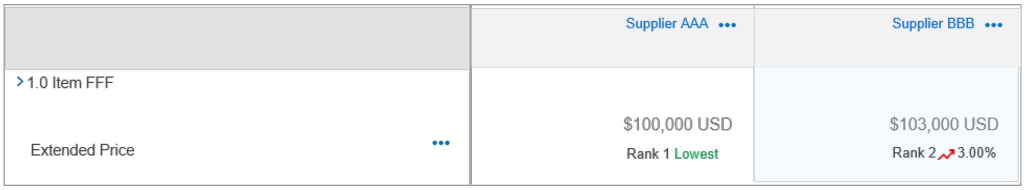
- **Preferred supplier**
- **Supplier qualification status**
- **Supplier registration status**

On sites with SAP Ariba Supplier Risk, you can also use filters for your site's configured risk fields.

Use the checkboxes to select the participants that you want to show responses for.

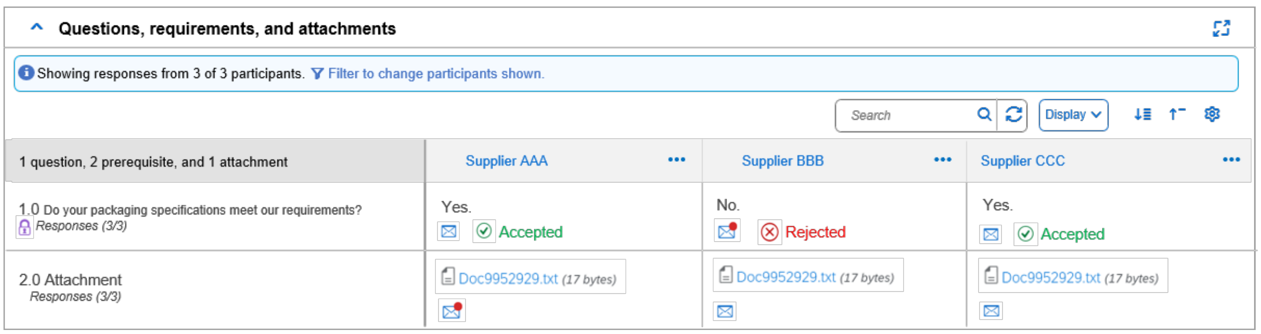
The **Items that need quotes** panel shows you initial, historical, and reserve values for terms, if you created these values when you created the event.

If a competitive term was configured for an item, the rank for each response is listed below the response. In the following example, the competitive term is **Extended Price**, and the lowest value is the best. The response for Supplier AAA is the best (Rank 1); the response for Supplier BBB is the second best (Rank 2) and is 3% higher (the upward arrow, followed by 3%).



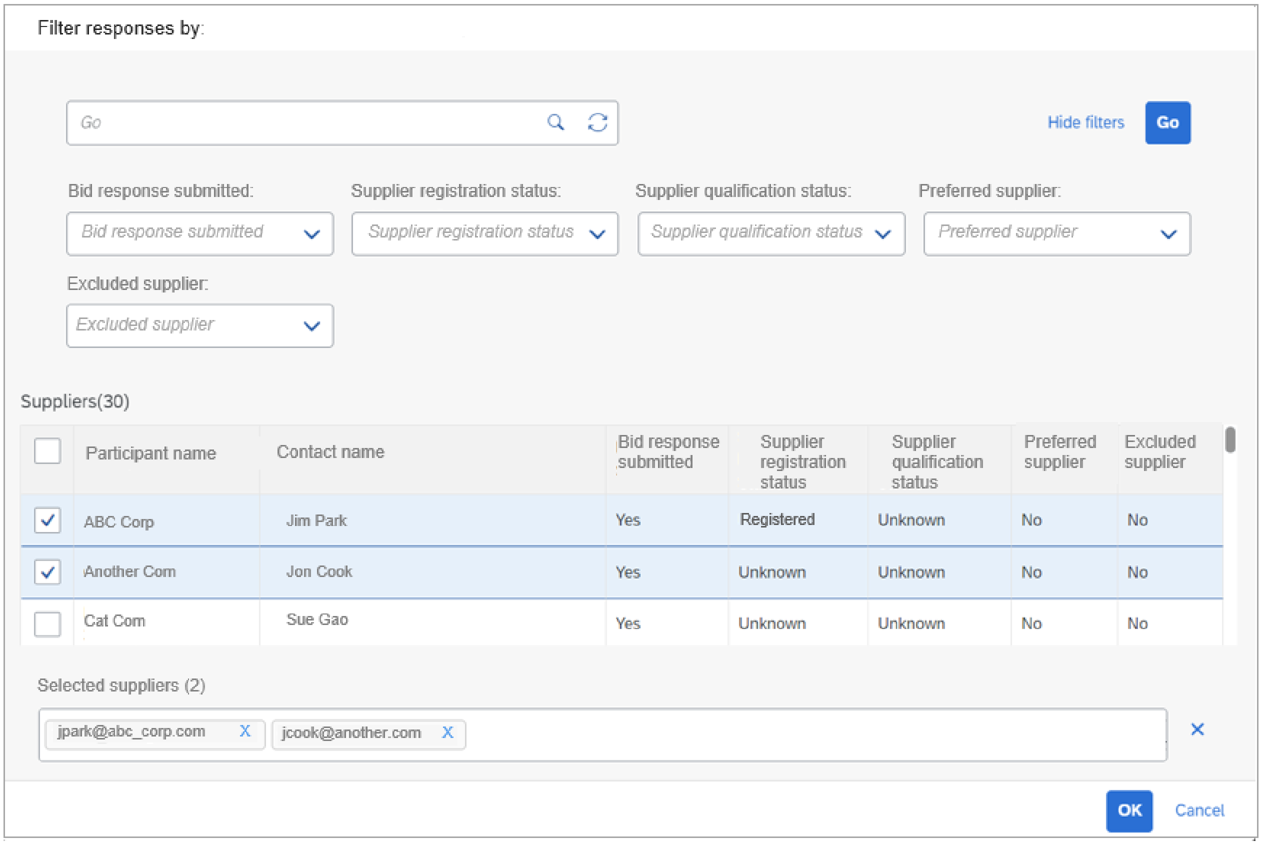
The Questions, requirements, and attachments panel

The **Questions, requirements, and attachments** panel shows you supplier responses to your questions:



By default, the **Questions, requirements, and attachments** panel can show the responses from up to 20 participants, as specified by the **Maximum suppliers for question responses table in guided sourcing monitor page** (`Application.AQS.MaxDisplaySuppliersGS`) parameter. An administrator for your site can change the value of this parameter using the Intelligent Configuration Manager; the maximum value is 40 (show the responses from up to 40 participants).

The filter icon in the blue banner at the top of the page opens a popup for filtering the columns with participant responses. Click **Show filters** to open filter fields:



You can use the following filters to select participants:

- **Bid response submitted**
- **Excluded supplier**

On sites with SAP Ariba Supplier Management solutions, you can also use the following filters:

- **Preferred supplier**
- **Supplier qualification status**
- **Supplier registration status**

On sites with SAP Ariba Supplier Risk, you can also use filters for your site's configured risk fields.

Use the checkboxes to select the participants that you want to show responses for.

You can click the comment icon ( ) to send specific comments to participants about their responses to prerequisite questions, which they can review and reply to.

You can also use the **Questions, requirements, and attachments** panel to review and approve responses to prerequisites, requirements, questions, and attachments.

Event Monitoring Tips

- You can edit event content in the monitoring phase by choosing the more icon (...) and selecting **Edit event**. When you edit events, the event returns to the **Create** phase until you click **Update** to update event content. After that, the event returns to the **Monitor** phase.
- When you copy an event, the copied event opens in the **Create** phase.
- Click **Close** to exit the monitoring page and return to the dashboard.
- When an active competitive RFP or auction has one hour or less remaining, you can use the **Request Immediate Assistance** button to receive escalated product support.

Viewing Supplier Risk Information from the Event Monitoring Page

Use this procedure to view supplier risk information for guided sourcing events in monitor and review responses phases.

Prerequisites

- This feature is supported only in the guided sourcing user interface. This feature adds support in guided sourcing for viewing supplier risk information.
  Your site must be set up for guided sourcing.
- You must be a member of the **Category Buyer** group to create and run guided sourcing events. For more information, see Managing events with guided sourcing.
- Your site must be integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions.

Context

If your site is integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions, you can view supplier risk information in a guided sourcing event in the monitor and review responses phases.

Procedure

1. Open the event that is in the monitor or review responses status.
2. View the supplier risk information.
    - In the **Items that need quotes** or **Questions, requirements, and attachments** panel, click a **Supplier name** hyperlink to open the supplier card.

In the supplier card, **Vendor ID** is displayed if your site is integrated with SAP Ariba Supplier Lifecycle and Performance.

- In the **Items that need quotes** or **Questions, requirements, and attachments** panel, click a hyperlink in the **Risk level** field to open the supplier risk card.
  In the supplier risk card, you can view the **Name**, **Score**, and **Risk level** for the supplier.
    - To go back to the supplier card, click the back icon (<).
    - To close the supplier risk card, click **Close**.

In SAP Ariba Supplier Risk, upto 25 custom supplier risk categories can be defined. In the guided sourcing user interface, you can view custom categories in the **Suppliers** panel of a guided sourcing event. In the **Suppliers** panel, when you click the risk hyperlink in the **Risk Level** column, SAP Ariba Sourcing fetches the risk categories associated with that supplier from SAP Ariba Supplier Risk and displays them in the popup along with the risk **Score** and **Risk Status**.

> Note
>
> To see the custom categories of supplier risk,
>
> - The feature **ARI-16780** must be enabled.
> - A member of the Customer Administrator group in your organization must enable the self-service site configuration parameter `Application.SR.Risk.EnableCustomRiskCategories` in SAP Ariba Supplier Risk.

Monitoring Auction Bids in Guided Sourcing

Use this procedure to perform real-time monitoring of auction bids. The **Bid console** page of the guided sourcing UI enables you perform near real-time monitoring of bids received in English and Dutch auctions, as well as Japanese reverse auction events.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

After you publish an English or Dutch auction event, or a Japanese reverse auction event, you can monitor the event from the **Bid console** page. The **Bid console** page provides near real-time updates of the event.

> Note
>
> You can use the **Bid console** page to monitor English forward and reverse auctions, Dutch forward and reverse auctions, and Japanese reverse auctions.

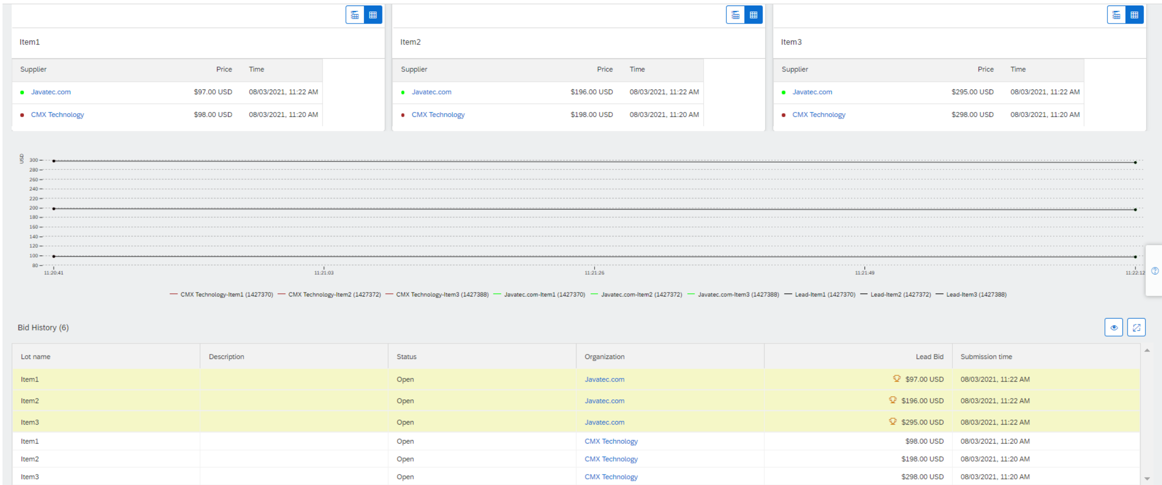
The **Bid console** page provides you the following details in near real time:

- Supplier participation information, such as number of suppliers invited, participated, and declined, in graphical format and as text.
- Recent bid information such as items, suppliers, and bid amounts.
- Event duration information such as start time, end time, and remaining time.
- A graphical representation of bids received for the event.
- A table that lists the lots and items and provides information such as status of the item, historical price, lead bid, and lead bidder for the item. You can choose to hide or show the columns in the table by selecting the gear icon ( ) to open a column selector. You can resize columns and view the table in the full screen mode. You can also expand all ( ) and collapse all ( ) item entries.
- A watch option that enables you select up to four items and view the bid details for those item in cards that contain tabular and graphical representation of the bid data. The watch option also provides a graph view that shows the bids for all selected items and a bid history table.
- A **View details** option for each of the items and lots to help you access the *item details* page that contains details such as the header information for the item, item settings, item-level bidding rules, and bid history for the item in graphical and tabular format.
- A new icon *> (greater than)* is added for each bid entry in the **Bid History** table to help you access details of a bid. You can click this icon against any entry in the *item details* page to view details of that bid.
- A new page **Response Details** is added to appear when you click *> (greater than)* corresponding to a bid entry in the **Bid History** table. The **Response Details** page displays the details of the bid submitted by the supplier for the selected item. If you click the *> (greater than)* icon corresponding to a bid entry for a lot, the **Response Details** page also displays the bid details for the items in the lot.
  The **Response Details** page also provides an option for you to delete bids. Project group team members who have the **Event Administrator**, **Limited Event Administrator**, and **Sourcing Project Administrator** role have the permission to delete bids. For details about how to delete bids from the **Response Details** page, refer to Deleting an Auction Bid in Guided Sourcing .

Procedure

1. From the *Event monitoring* page of the auction event that you want to monitor, click the **More actions** icon ( ) and select **Event options** > **View bid console**.
2. Based on your specific requirements, perform one of the following tasks:
   a. To monitor items closely, you can select up to four items from the **Lots** table and click **Watch**.

      The **Bid console/ Watching** page for the selected items appears.



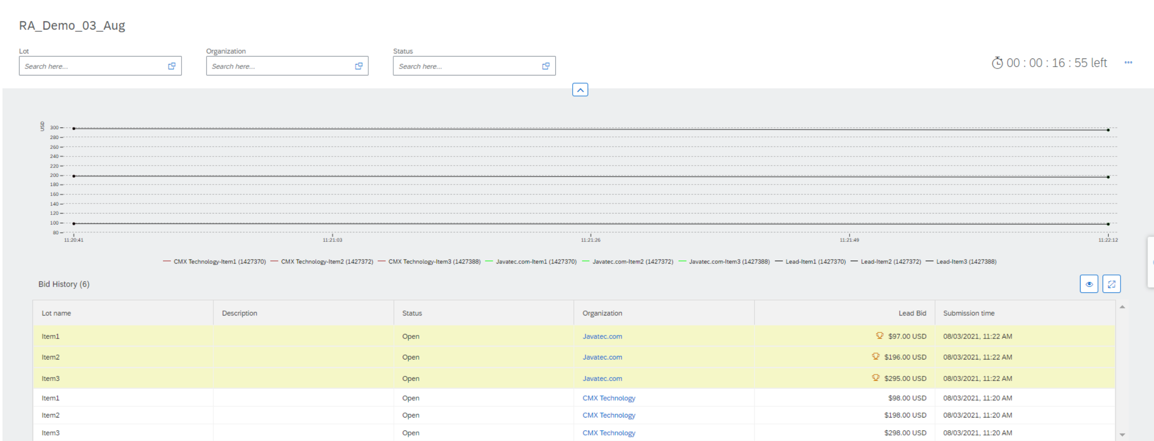
The **Watching** page contains the following details:

- Item cards that show the top six bids for the item and details such as the supplier name, bid amount, and the time the bid was submitted. You can switch the item card view between table view and graph view.
- Graphical representation of the top bids for the selected items.
- Bid history table that shows the status, lead bid, lead bidder, and bid submission time for the selected items. If you are watching a Dutch reverse auction, the bid history table also shows **Current price**, **Adjustment interval**, **Ceiling**, and **Remaining quantity**. You can choose to hide or show the columns in the table by selecting the gear icon ( ) to open a column selector. You can also choose to resize columns and view the table in the full screen mode.

> → Tip
>
> Click the supplier name to view the supplier details.

b. To view all recent bids, click the **View all** link in the **Recent bids** section.

The **Bid Console/ Recent bids** page appears.



The **Recent bid** page provides a graphical view of the recent bids and a table that shows the bid history.

The graph view provides three filtering options:

- **Lot** to filter based on the lot or item name.

    - **Organization** to filter based on the supplier name.
    - **Status** to filter based on the item status. For example, awarded or pending selection.
3. From the **Bid console** page, you can also perform the following tasks:
    - **Stop event**
    - **Cancel event**
    - **Reduce timing**
    - **Extend timing**

    > Note
    >
    > For events that have the **Choose how lots will open and end** rule set to **Parallel**, the timing is extended or reduced for the entire event.
    >
    > For events that have the **Choose how lots will open and end** rule set to **Staggered** or **Serial**, the timing can be extended or reduced at item level. The item-level controls for modifying the timing are available against the items in the bid history table.

    - **Edit event**
    - **Copy event**
    - **Download event summary**
    - **View audit logs**

Monitoring English Forward Auction Activity in Guided Sourcing

Use this procedure to monitor the bidding activity in an English forward auction event through the **Bid Console** page.

Prerequisites

- You must be a member of the **Category Buyer** group.
- You have published the auction event that you want to monitor.

Context

After you publish an English forward auction event, you can monitor the event from the **Bid console** page. The **Bid console** page provides near real-time updates of the event. The option to view the bid console is available on the **Monitor**, **Review responses**, and **Award** steps of a forward auction event.

Procedure

1. Open the forward auction event that you want to monitor. Click the **More actions** icon (•••) and select **Event options** > **View bid console**.

   The **bid console** page appears and the following details are dynamically updated:
   - Participant information, such as the number of participants invited, participated, and declined, in graphical format and as text values.
   - Recent bid information such as items, lead bidders, and bid amounts.
   - Event duration information such as start time, end time, and remaining time.
   - A graphical representation of the bids for easy analysis.
   - A table that lists the lots and items and provides information such as status of the item, historical price, lead bid, and lead bidder for the item. You can choose to hide or show the columns in the table by selecting the gear icon ( ) to open a column selector. You can resize columns and view the table in the full screen mode. You can also expand all ( ) and collapse all ( ) item entries.
2. Based on your requirement, perform one of the following tasks:
   a. To monitor items closely, you can select up to four items from the **Lots** table and click **Watch**.

      The **Bid console/ Watching** page for the selected items appears.

      The **Watching** page contains the following details:

      - Item cards that show the top six bids for the item and details such as the participant name, bid amount, and the time the bid was submitted. You can switch the item card view between table view and graph view.
      - Graphical representation of the top bids for the selected items.
      - Bid history table that shows the status, lead bid, lead bidder, and bid submission time for the selected items. You can choose to hide or show the columns in the table by selecting the gear icon ( ) to open a column selector. You can also choose to resize columns and view the table in the full screen mode.

        → Tip

        Click the participant name to view the participant details.

        If there are more than 20 bids for the selected items, pagination controls are displayed to help you navigate across the pages.
   b. To view all recent bids, click the **View all** link in the **Recent bids** section.

      The **Bid Console/ Recent bids** page appears.

      The **Recent bid** page provides a graphical view of the recent bids and a table that shows the bid history.

      The graph view provides three filtering options:
      - **Lot** to filter based on the lot or item name.
      - **Organization** to filter based on the participant name.
      - **Status** to filter based on the item status. For example, awarded or pending selection.
3. From the **Bid console** page, you can also perform the following tasks:

   - **Stop event**
   - **Cancel event**

- **Reopen event**
- **Reduce timing**
- **Extend timing**

> Note
>
> For events that have the **Choose how lots will open and end** rule set to **Parallel**, the timing is extended or reduced for the entire event.
>
> For events that have the **Choose how lots will open and end** rule set to **Staggered** or **Serial**, the timing can be extended or reduced at item level. The item-level controls for modifying the timing are available against the items in the **Lots** table.

- **Edit event**
- **Copy event**
- **Download event summary**
- **View audit logs**

Editing the Duration of Published Events in Guided Sourcing

While an event is open, you can extend or reduce the time remaining. Use this procedure to edit the duration of published events.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Procedure

1. In the **Monitor event** panel on the monitoring page, click **Edit**.
2. Choose one of the following to configure the event end time:
    - **Time**. Choose a date and time when the event ends.
    - **Duration**. Enter a value in either minutes, hours, or days to set the remaining duration of the event.
3. Click **Update**.

    SAP Ariba sends participants an email indicating that the timing of the event has been updated and logs this action in the event audit log.

Resending Invitations to Participants in Guided Sourcing Events

Use this procedure to resend invitation emails to one or more participants while a guided sourcing event is open.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

When you publish an event, SAP Ariba automatically sends invitation emails to each event participant. You may need to resend event invitation emails to participants for a variety of reasons, such as they didn't receive the email, they can't locate the original email, or they don't respond. While the event is open, you can resend invitation emails to one or more participants.

Procedure

1. In the **Items that need quotes** panel on the **Monitor event** page, click the more icon (···) next to the participant's name.
2. Click **Resend invitation email**.
3. Click **Send**.

   SAP Ariba logs this action in the event audit log.

Locking Participants in Guided Sourcing Events

Use this procedure to lock participants out of an event, removing their ability to access any information associated with the event.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

Locked participants, including all the contacts from the participant's organization, cannot access any information associated with the event. You can lock and unlock participants at anytime while the event is open and in a pending selection state. There are a variety of reasons why you may need to lock a participant out of an event, such as you determine that one of the participants is not serious about competing or a participant is attending your event in order to learn about competitors' prices. After you lock a participant, SAP Ariba sends the participant an email informing them about the lockout.

> ⓘ Note
>
> Locking a participant (supplier) out of event is not the same as locking a supplier user's account. Locking a participant out of an event does not prevent them from signing in to their SAP Ariba account. However, when a supplier user's **account** is locked (either manually locked by a supplier administrator in your organization, or automatically and temporarily locked because of multiple failed sign in attempts in a short time period), the supplier user cannot sign in to their SAP Ariba account.

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.

Keep the following in mind when locking participants out of an event:

- 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.

Procedure

1. In the **Items that need quotes** panel on the **Monitor event** page, click the more icon (···) next to the participant's name.
2. Click **Lock supplier**.
3. Click **Lock**.

   SAP Ariba sends the participant an email and logs this action in the event audit log. The participant lock icon displays next to the participant's name in the **Items that need quotes** panel.

Next Steps

To unlock a participant, click the more icon (···) next to the participant's name and click **Unlock supplier**.

Placing Surrogate Bids in Guided Sourcing Events

Use this procedure to place bids on behalf of participants who are unable to place their own bids, perhaps because of technical problems.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

You must be a member of one of the following groups:

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 team member group for the event

Context

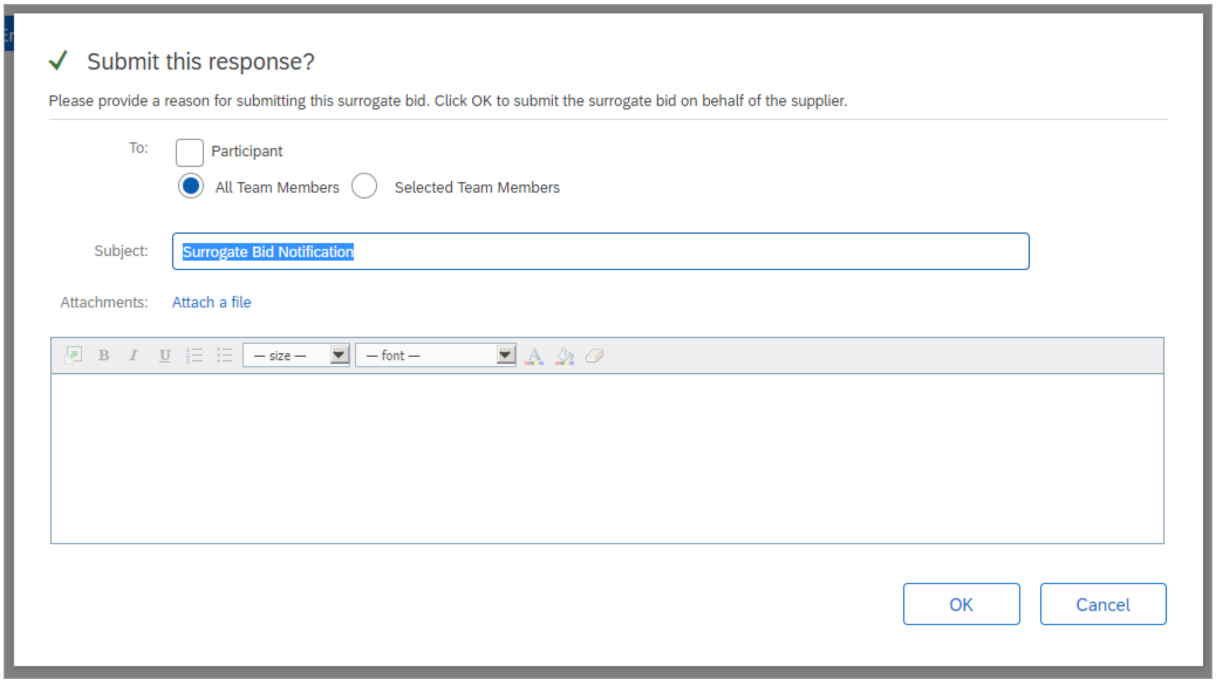
Surrogate bidding enables a team member to act as a participant to place bids if the participant cannot.

> **Restriction**
>
> Surrogate bidders cannot access or change participant account preferences.

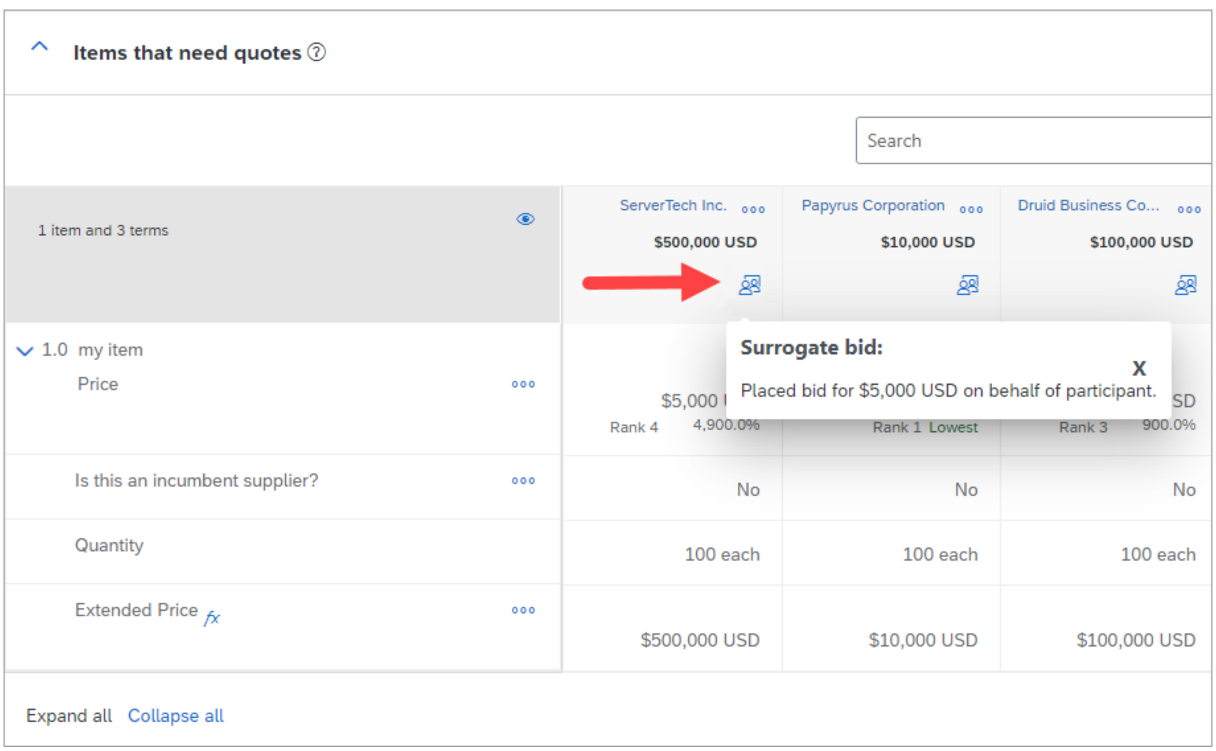
Procedure

1. In the **Items that need quotes** panel on the **Monitor event** page, click the more icon (···) next to the supplier's name.
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 supplier's event list.
4. Navigate to the bid console and enter the participant’s bid.

   If the **Require surrogate bid justification** rule is set to **Yes**, a pop-up window opens with a prompt to enter a reason for submitting the surrogate bid.



Optionally, you can attach a file that supports your reason for placing a surrogate bid. After the bid is submitted, the **Surrogate bid justification** icon ( ) appears below the bid amount. You can view the justification by clicking the **Surrogate bid justification** icon ( ) in the **Items that need quotes** panel on the **Monitor event** page.



5. Click **Submit Entire Response**.

> ⓘ Note
>
> If the **Require surrogate bid justification** rule is set to **Yes**, you must enter a justification for submitting a surrogate bid.

6. 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.

Next Steps

SAP Ariba adds an audit entry on the **Log** tab, indicating that a bid was placed on behalf of the participant.

Managing Responses to Prerequisite Questions in Guided Sourcing Events

Use this procedure to monitor, accept, and reject responses to prerequisite questions in the **Questions, requirements, and attachments** panel on the monitoring page.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

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.

When you reject an answer, you can change the status to **Accepted** regardless whether participants submitted an updated response.

The participation gate icon ( ) appears next to questions that you must review and accept. Questions that are pending your review are indicated by an orange triangle ( ).

Procedure

1. In the **Questions, requirements, and attachments** panel on the monitoring page, move your mouse into the response cell to see the accept (✓) and deny (✕) icons.
2. Click the accept icon (✓) to approve responses and the deny icon (✕) to reject responses.

   SAP Ariba logs this action in the event audit log.

Adding Comments to Prerequisite Question Responses in Guided Sourcing Events

Use this procedure to add comments to preprequisite question responses. Team members can add comments directly to prerequisite question responses, which participants can review and reply to.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

Team members can send comments or additional information for each response to a prerequisite question, 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.

Participants receive an email notification with your comments. In addition, they can review and respond to any comments online. Comments you send on specific responses are indicated by an icon on the participant's bid console page. Any replies participants send are viewable by the project team in the **Questions, requirements, and attachments** panel. The comment icon ( ) updates to indicate when you receive new replies from participants.

SAP Ariba logs the comments you send in the event **Messages** tab. For more information about the **Messages** tab, see About the Messages tab.

Procedure

1. In the **Questions, requirements, and attachments** panel on the monitoring page, click the comment icon ( ) for the response to which you want to add a comment.

2. Enter your comment.
3. Optionally, click **Apply to all participants** if you want to send the comment to all participants for that response.
4. Click either **Send** to send your comment or **Save & Exit** to save a draft of your comment to send later.

Deleting an Auction Bid in Guided Sourcing

Use this procedure to delete an auction bid.

Prerequisites

- To delete an auction bid, 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.
- The auction event must be in the **Open** or **Paused** state.

Context

If you have permission, you can delete auction bids. For example, in the event that one of the participants in an auction submits a bid that is drastically higher or lower than the other bids (this also might occur if a participant inadvertantly adds or leaves out zeros), the system might define it as the leading bid and base the bid improvement rules on this 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.
> - The **Delete bid** function is not available for Japanese auctions.
> - The **Delete bid** function is not available when an auction event is stopped (or in the **Review responses** phase), canceled, or marked as complete.

Procedure

1. On the auction **Monitor** page, click **Bid console** at the upper-left corner of the page, and click **View all** in the **Recent bids** area.
2. On the **Recent bids** page, scroll down to the **Bid History** table, find the bid that you want to delete, and click *> (greater than)* corresponding to the bid that you want to delete.
3. On the **Response details** page, click **Delete bid**.

Results

- The bid information is removed from all the tables and graphs that display this information, including tables and graphs on the **Bid console**, item details page, **Recent bids** page, and **Watching** page.
- If the deleted bid is the best bid, the second best bid automatically changes to the best bid.
- The participant receives a notification stating that you deleted the bid.

Deleting an RFP or RFI Bid in Guided Sourcing

If you have permission, you can use this procedure to delete bids that are received in an RFP or RFI sourcing event.

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.
- The RFP or RFI sourcing event must be in the **Open** or **Paused** state.
  The **Delete bid** function is not available when an RFP or RFI sourcing event is stopped (or in the **Review responses** state), canceled, or marked as complete.

Procedure

1. On the RFP or RFI **Monitor** page, select the **Summary** panel, and click **Placed bids** in the **Supplier participation** area.
2. In the **Placed bids** table, find the supplier whose bid you'd like to delete, and click the number corresponding to this supplier in the **Total bids placed** column.
3. In the table that displays the bid history of this supplier, click the *> (greater than)* icon corresponding to the active bid (bid in the **Accepted** status).

   > ⓘ Note
   >
   > - If a supplier has revised their bids in the bidding process, each revision has a record in the bid history table of this supplier. The latest revision is the active bid and is in the **Accepted** status. Other historical revisions are in the **Replaced** status and are inactive.
   > - Only active bids can be deleted. After you delete an active bid, the last historical revision automatically switches to the active bid. The **Bid Status** of the deleted bid is changed from **Accepted** to **Withdrawn**.

4. On the **Response details** page of the selected bid, click **Delete bid**.

   > ⓘ Note
   >
   > - The **Delete bid** button is invisible if you don't have the **Event Administrator**, **Limited Event Administrator**, or **Sourcing Project Administrator** role.

- If you click **Delete bid**, the entire bid is deleted. You can't select individual items to delete.
- If envelope bidding is enabled and the corresponding envelope is not opened, information about the selected bid is not revealed on the **Response details** page, but you still can delete the bid.

Results

- The bid information is removed from all the tables that display this information.
- The participant receives a notification stating that you deleted the bid.

About Downloading All Supplier Attachments

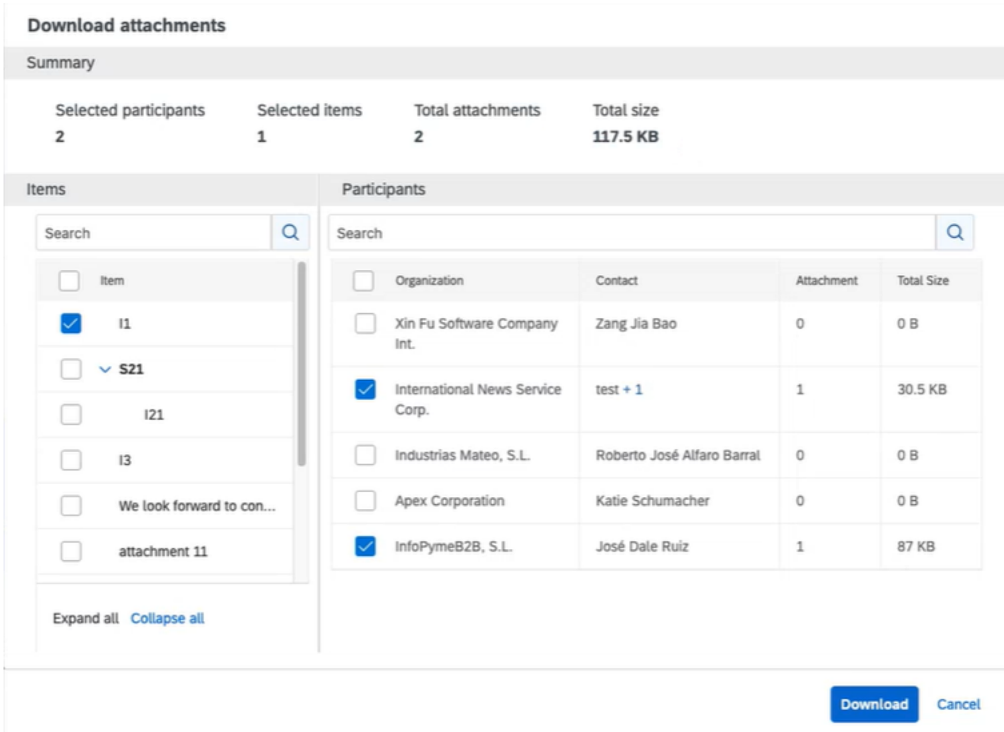
Suppliers can add attachments when they respond to an event with their bid response. These supplier attachments for guided sourcing events are displayed in the supplier column of the line items table. You can download supplier attachments by clicking on the specific attachment displayed in the line items table. You can also download all or multiple supplier attachments at once by using the **Download supplier attachments** option.

The **Download supplier attachments** option is available in the more icon ( ) and the download icon ( ) of the guided sourcing event in the monitor, review responses, and award phase.

> Note
>
> The download icon is available in the **Items that need quotes** panel for events in the monitor phase and in the **Best Bid award allocation** panel for events in the review response or award phase.

The **Download supplier attachments** option allows you to select the items for which you want to download the supplier attachments and also select suppliers (participants) for the items. You can select all items and suppliers to download all supplier attachments at once. You can also select specific items and suppliers to download specific supplier attachments.

In order to download supplier attachments, you must ensure to select at least one line item and one supplier. A zip file will be downloaded with individual folder for each supplier. Each folder lists all the attachments from the specific supplier.



You can download supplier attachments up to a maximum of 500 MB file size by using the **Download supplier attachments** option. If the total file size of the attachments exceeds 500 MB, an error message will be displayed.

Downloading Supplier Attachments in Guided Sourcing Events

Use this procedure to download supplier attachments.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

You can download all or multiple supplier attachments at once from guided sourcing events. This section assumes that the guided sourcing event in use is in the monitor, review responses, or award phase.

Procedure

1. Open the guided sourcing event.
2. To download supplier attachments, select **Download supplier attachments** from the more (···) icon or the download (⤓) icon.

   > ⓘ Note
   >
   > The download icon is available in the **Items that need quotes** panel for events in the monitor phase and in the **Best Bid award allocation** panel for events in the review response or award phase.

   The **Download attachments** popup appears. The **Download attachments** popup displays a Summary section and a table for buyers to choose items and supplier participants.
3. In the **Download attachments** popup, select the following:
   - Select the items for which you want to download attachments.
   - Select the supplier participants, the attachments from the suppliers you want to download.
4. Review the selected participants, selected items, total attachments, and total size displayed in the Summary section of the **Download attachments** popup.
5. Click **Download**.

Results

A zip file is downloaded to the system with individual folder for each supplier. The folder lists all the attachments of the specific supplier.

Review Responses and Award Creation for Guided Sourcing 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.

Guided Sourcing Award Scenarios Panel [page 515]

Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]

Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]

Using Optimization Scenarios to Award Guided Sourcing Events [page 524]

Using Bid Analysis to Award Guided Sourcing Events [page 530]

Grading-Based Item Awards in Guided Sourcing events [page 537]

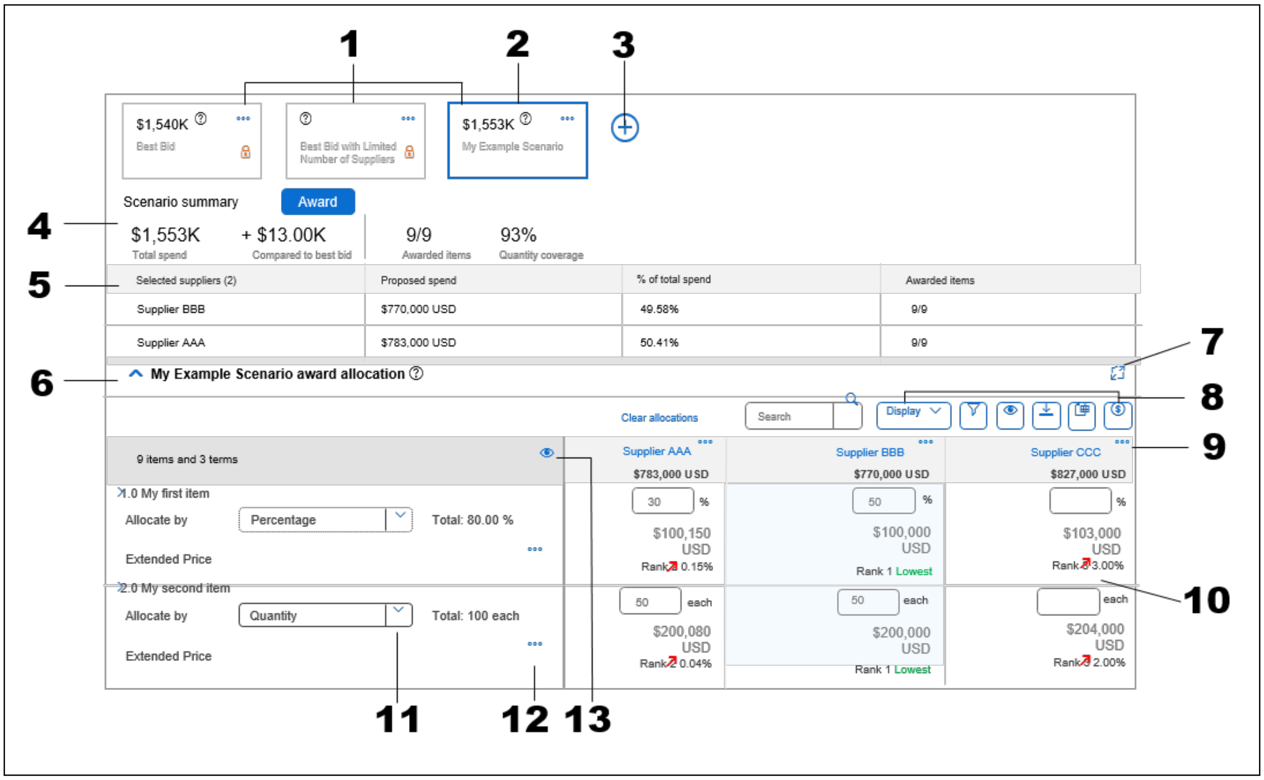
Viewing Associated Contracts for Guided Sourcing Events [page 538]

Related Information

Ability to create multiple follow-on documents from an awarded scenario

Guided Sourcing Award Scenarios Panel

When an event is in the **Review responses** phase, you use the **Award scenarios** panel to view, edit, and create award scenarios with possible suppliers and award allocations, then create awards from the scenarios.



If you have bid analysis enabled, select the **Scenario Maker** tab in the **Award scenarios** panel.

1. Scenario cards.
2. Scenario card for the currently selected scenario, which is outlined in blue. The table below the cards shows details about the selected scenario. Click the more icon in the scenario card (•••) for options to **Copy**, **Delete**, or **Hide** the scenario. If the scenario is an optimization scenario, the option **Edit constraints** is also shown.
3. Click to create a scenario. You have the choice to start a new scenario or copy an existing one.
4. Summary of the selected scenario (the corresponding scenario card has a blue border).
5. Suppliers, proposed spend, percentage of total spend, and number of items awarded out of total number of items, for the selected scenario.
6. Expandable/collapsible **Allocate awards** panel for the selected scenario.
7. Expand the **Allocate awards** panel to full screen. In full-screen mode, exits that mode. In this panel, above the supplier names, click **Clear allocations** to remove all items from the selected scenario.
8. Options and icons for the allocate awards panel.
    - **Display**: Display grading criteria for scoring. Only present in events with grading and scoring enabled.
    - : Filter rows.
    - : Select supplier columns to show or hide.
    - : Download reports to compare bids or to see the progress of bidding during the event.
    - : Import award allocations from Excel or export allocations to Excel (export an Excel template if there are no allocations).

- $: Change the currency used to display money values. Only present in multi-currency events.

9. More icon for each supplier. Click this icon for options to hide the supplier, or to allocate all items to the supplier by using **Allocate to this supplier**. You can also allocate all of an item to a supplier by clicking the cell at the intersection of the item and the supplier. For suppliers with awarded items, options appear to create a contract for the items awarded to that supplier, or to add the items to an existing contract. If there's an award approval task, the submitted scenario must be approved before you can initiate a contract.
10. Bidder rank, with percentage above best bid next to red arrow.
11. Down arrow lets you allocate by price or by quantity.
12. More icon for each item. Click for options to sort all supplier columns in the event based on bids for this item in ascending order (supplier with best bid is shown first) or descending order (supplier with worst bid is shown first), or to clear sorting.
13. Show or hide **Initial value** and **Historical value**.

Parent topic: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]
Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]
Using Optimization Scenarios to Award Guided Sourcing Events [page 524]
Using Bid Analysis to Award Guided Sourcing Events [page 530]
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Using Manual Award Scenarios to Award Guided Sourcing Events

When your event is no longer accepting responses from participants, you can use this procedure to award the lots or line items in the event using manual scenarios.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be in the **Review responses** state (also referred to as the **Pending Selection** state).
- (Optional) To send award scenario information to an external system, the event must be created from a template with the following settings in the **Price Acceptance and Integration Actions** section:
  - **Allow external system integration** is set to **Yes**.

- The required follow-on documents are specified for **Allow integration types**.
- (Optional and available only for product sourcing events) To send pricing information to the pricing database or to an external system, the event must be created from a template with options to do so. For more information, see Configuring Sourcing Templates to Accept Supplier Quotes as Contracted or Estimated Prices Without Creating a PIR in the SAP Ariba Product Sourcing Guide.

Context

A manual scenario allows you to award specific lots or items to individual suppliers, and split the award of a lot or item by percentage or quantity among multiple suppliers. A manual scenario is useful if your awarding decision is fairly obvious. For large and complex events where the awarding isn't easy to determine, you can use an optimization scenario [page 524].

You can enter award allocation amounts directly on the award page, or upload allocations from a spreadsheet [page 520].

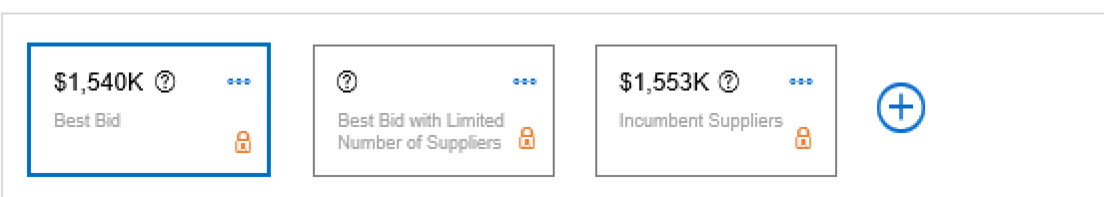
If your site has bid analysis enabled, you can use bid analysis [page 530] to analyze, sort, and filter bids, and then create a manual scenario from the results.

Procedure

1. From any of the following locations, select the event for which you want to award the lots or line items:
   - **For you** > **Recently viewed**
   - **For you** > **Summary** > **Review responses**
2. Navigate to the **Award scenarios** panel.

   If you have bid analysis enabled, select the **Scenario Maker** tab.

   The **Award scenarios** panel shows cards for existing scenarios, including preconfigured optimization scenarios provided by SAP Ariba, such as **Best Bid**.

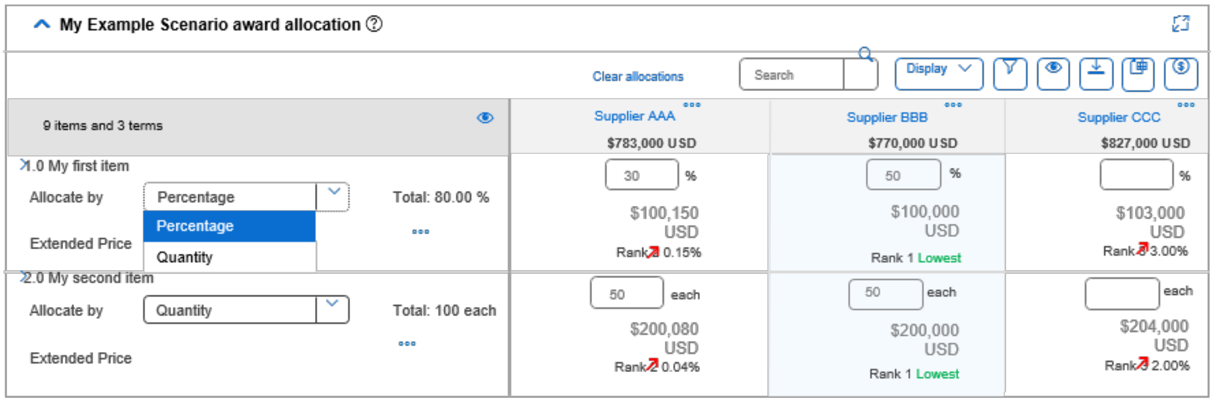
   

   The current scenario is outlined in blue, and values for the current scenario are shown in the table below the cards.
3. Select the ⊕ icon to the right of the scenario cards.
4. Enter a name for the scenario.
5. **Optional:** Enter a description for the scenario.
6. Select **Start a new scenario**.
7. Choose **Done**.

8. In the **Allocate awards** panel, enter the allocation values for each lot or line item by percentage or quantity.

   Use the dropdown menu for each lot or line item to choose to allocate by **Percentage** or **Quantity**. Enter the values in the columns for each supplier.

   The award allocation panel should look similar to this:



> ⓘ Note
>
> - If traffic light bidding rule values are configured for a lot or item, traffic light values are shown below the response based on the bid value and rule values. For more information, see Enabling Traffic Light Bidding in English Reverse Auctions in Guided Sourcing [page 112].
>   If the event includes service outlines, the number of awarded items versus the total number of items displayed in the **Scenario summary** under the **Award scenarios** panel does not include service outlines.
> - To display a **Total** row with rolled-up values at the top of the award allocaion panel, contact SAP Ariba Support to enable the **Display the Total row in award allocation panel** (`Application.AQS.DisplayTotalRowInAwardAllocationPanel`) parameter.

9. **Optional:** Choose **Compare scenario** and select two or more scenarios that you want to compare.

> ⓘ Note
>
> You can select a maximum of six scenarios for comparison.

   a. After you select the scenarios that you want to compare, choose **Compare scenario**.

      The **Compare scenario** page appears and displays the summary of the selected scenarios.

      The selected scenarios are listed in the top right-hand corner of the page. You can remove any of the scenarios from the comparison by choosing the **x** button next to the scenario name.

      To close the **Compare scenario** page, choose **Cancel**.

10. Choose the scenario you want to award by selecting the corresponding scenario card.
11. Select **Award**.
12. Choose whether to send email notifications to participants who are getting awards and to participants who aren't getting awards.

    You can optionally select **Customize Award Emails** to customize the email notifications. See Event Notification Template Variables [page 576] for descriptions of the variables used in email notifications.

> ⓘ Note
>
> If an awarded supplier is not registered on SAP Business Network, no notification is sent to the supplier until the supplier is registered on SAP Business Network and has an SAP Business Network ID.

13. **Optional:** If the event is configured for integration with an external system, select one of the following options for **Do you want to create follow-on documents?**
    - **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
      Based on the values you specified in the **Allow integration types** field in the guided sourcing event template, the **Integration Type** field in the **Confirm award** dialog box displays the follow-on document type:
        - Only one follow-on document type is displayed for a single award.
        - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

      > ⓘ Note
      >
      > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. When you click **Show Details**, more details are displayed.
    - **No, not now** if you do not want to create a follow-on document based on the award.

    > ⓘ Note
    >
    > The **Do you want to create follow-on documents?** option is not available for events that have the award approval task enabled.
    >
    > The option to create a Purchase Information Report (PIR) document is available only for events created from templates with the rule **Allow users to accept a supplier's price as** set to **Contracted Price**. You cannot create a PIR when this rule is set to **Estimated Price**.
14. Select **Confirm**.

    A success message shows the total savings and the number of items awarded. If you chose to send award information to an external system to create a follow-on document, the message also indicates that the selected follow-on document is created.
15. **Optional:** To send award scenario information to an external system, click **Send prices to external system**.

    The **Send prices to external system** dialog box is displayed.

    Based on the values you specified for the **Allow integration types** drop-down in the guided sourcing event template, the **Integration Type** field in the **Send prices to external system** dialog box displays the follow-on document type:
    - Only one follow-on document type is displayed for a single award.
    - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

    > ⓘ Note
    >
    > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. To display more details, click **Show Details**.

16. Click **Confirm**.

Task overview: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]
Using Optimization Scenarios to Award Guided Sourcing Events [page 524]
Using Bid Analysis to Award Guided Sourcing Events [page 530]
Grading-Based Item Awards in Guided Sourcing events [page 537]
Viewing Associated Contracts for Guided Sourcing Events [page 538]

Using Manual Award Scenarios and Excel to Award Guided Sourcing Events

Use this procedure to export a manual award scenario to an Excel spreadsheet and edit the spreadsheet to create award allocations based on percentage or quantity. Then, you can import the spreadsheet back to SAP Ariba to update the award scenario.

Prerequisites

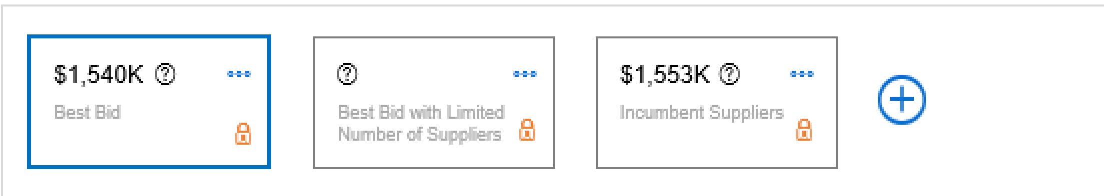
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be in the **Review responses** state (also referred to as the **Pending Selection** state).
- (Optional) To send award scenario information to an external system, the event must be created from a template with the following settings in the **Price Acceptance and Integration Actions** section:
  - **Allow external system integration** is set to **Yes**.
  - The required follow-on documents are specified for **Allow integration types**.
- (Optional and available only for product sourcing events) To send pricing information to the pricing database or to an external system, the event must be created from a template with options to do so. For more information, see Configuring Sourcing Templates to Accept Supplier Quotes as Contracted or Estimated Prices Without Creating a PIR in the SAP Ariba Product Sourcing Guide.

Procedure

1. From any of the following locations, select the event for which you want to award the lots or line items:
    - **For you** > **Recently viewed**
    - **For you** > **Summary** > **Review responses**
2. Navigate to the **Award scenarios** panel.

   If you have bid analysis enabled, select the **Scenario Maker** tab.

   The **Award scenarios** panel shows cards for existing scenarios, including preconfigured optimization scenarios provided by SAP Ariba, such as **Best Bid**.

   The current scenario is outlined in blue, and values for the current scenario are shown in the table below the cards.
3. Select the card for the manual award scenario you want to update.

   > ⓘ Note
   >
   > Optimization award scenarios cannot be exported or imported, including the preconfigured **Best Bid**, **Best Bid with Limited Number of Suppliers**, and **Best Savings** scenarios.

4. In the **Allocate awards** section, click the **Import award scenario** icon ( ) and select **Export as Excel**.

   The downloaded spreadsheet includes an **Award Allocation Instructions** sheet and an **Award Allocation** sheet.
5. Edit the content in the **Award Allocation** sheet to award the event to suppliers based on percentage or quantity and save the spreadsheet.
    - In the **Organization** column, enter the names of supplier organizations to whom you want to award the item. Configure one supplier organization in each line.

      > ⓘ Note
      >
      > If your site uses SAP Ariba Supplier Lifecycle and Performance or SAP Ariba Supplier Information and Performance Management (new architecture), enter the supplier name.

      If you want to allocate awards across primary and alternative bids for suppliers, enter the alternative name in the **Alternative** column for alternative bids and leave the **Alternative** column blank for primary bids.
    - Enter the percentage of the award to allocate for each supplier in the **Allocation** column or specify the quantity to allocate in the **Quantity Allocation** column.

The following example is part of the spreadsheet for an award scenario with primary and alternative bids:

Name	Alternative	Bundle or Tier Name	Type	* Organization	* Allocation	Quantity Allocation	Lead Participant
Item 1			Line Item	Company A	75.00%		Company A
Item 1			Line Item	Company B	25.00%		
Item 1	Alter_A		Line Item	Company A	80.00%		
Item 1	Alter_B		Line Item	Company B	20.00%		
item2			Line Item	Company A		20	Company B
item2			Line Item	Company B		80	
item2	Alter_A		Line Item	Company A			
item2	Alter_B		Line Item	Company B			

6. Perform one of the following actions to import the spreadsheet:
    - In the **Allocate awards** section, click the **Import award scenario** icon ( ) and select **Import award scenario**.
    - In the upper-right corner of the event page, click the more icon ( ) and select **Import award scenario**.
7. **Optional:** Choose **Compare scenario** and select two or more scenarios that you want to compare.

> Note
>
> You can select a maximum of six scenarios for comparison.

    a. After you select the scenarios that you want to compare, choose **Compare scenario**.

    The **Compare scenario** page appears and displays the summary of the selected scenarios.

    The selected scenarios are listed in the top right-hand corner of the page. You can remove any of the scenarios from the comparison by choosing the **x** button next to the scenario name.

    To close the **Compare scenario** page, choose **Cancel**.
8. Choose the scenario you want to award by selecting the corresponding scenario card.
9. Select **Award**.
10. Choose whether to send email notifications to participants who are getting awards and to participants who aren't getting awards.

    You can optionally select **Customize Award Emails** to customize the email notifications. See Event Notification Template Variables [page 576] for descriptions of the variables used in email notifications.

> Note
>
> If an awarded supplier is not registered on SAP Business Network, no notification is sent to the supplier until the supplier is registered on SAP Business Network and has an SAP Business Network ID.

11. **Optional:** If the event is configured for integration with an external system, select one of the following options for **Do you want to create follow-on documents?**
    - **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
    Based on the values you specified in the **Allow integration types** field in the guided sourcing event template, the **Integration Type** field in the **Confirm award** dialog box displays the follow-on document type:
        - Only one follow-on document type is displayed for a single award.
        - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

> ⓘ Note
>
> If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can’t create a follow-on document. When you click **Show Details**, more details are displayed.

- **No, not now** if you do not want to create a follow-on document based on the award.

> ⓘ Note
>
> The **Do you want to create follow-on documents?** option is not available for events that have the award approval task enabled.
>
> The option to create a Purchase Information Report (PIR) document is available only for events created from templates with the rule **Allow users to accept a supplier's price as** set to **Contracted Price**. You cannot create a PIR when this rule is set to **Estimated Price**.

12. Select **Confirm**.

    A success message shows the total savings and the number of items awarded. If you chose to send award information to an external system to create a follow-on document, the message also indicates that the selected follow-on document is created.
13. **Optional:** To send award scenario information to an external system, click **Send prices to external system**.

    The **Send prices to external system** dialog box is displayed.

    Based on the values you specified for the **Allow integration types** drop-down in the guided sourcing event template, the **Integration Type** field in the **Send prices to external system** dialog box displays the follow-on document type:
    - Only one follow-on document type is displayed for a single award.
    - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

    > ⓘ Note
    >
    > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can’t create a follow-on document. To display more details, click **Show Details**.
14. Click **Confirm**.

Task overview: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]
Using Optimization Scenarios to Award Guided Sourcing Events [page 524]
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Grading-Based Item Awards in Guided Sourcing events [page 537]
Viewing Associated Contracts for Guided Sourcing Events [page 538]

Using Optimization Scenarios to Award Guided Sourcing Events

This procedure describes how to use optimization scenarios to award guided sourcing events. Optimization scenarios help you make award decisions by allowing you to create and compare hypothetical awarding models with goals and specific constraints to determine the potential awarding results.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be in the **Review responses** state (also referred to as the **Pending Selection** state).
- (Optional) To send award scenario information to an external system, the event must be created from a template with the following settings in the **Price Acceptance and Integration Actions** section:
  - **Allow external system integration** is set to **Yes**.
  - The required follow-on documents are specified for **Allow integration types**.
- (Optional and available only for product sourcing events) To send pricing information to the pricing database or to an external system, the event must be created from a template with options to do so. For more information, see Configuring Sourcing Templates to Accept Supplier Quotes as Contracted or Estimated Prices Without Creating a PIR in the SAP Ariba Product Sourcing Guide.
- The template used to create the event must have rollup terms that have ranking order specified.
- If your event contains a **Quantity** field, the field must contain an initial value at the event level for optimization scenarios to work correctly. To ensure proper evaluation of optimization scenarios, you can set initial values for the **Quantity** field. (If a supplier changes the **Quantity** to the match the quantity they supply, optimization scenarios will still work correctly.)

Context

An optimization scenario consists of:

- A **goal**, such as minimizing the value of the **Total Cost** term for each item.
- Optional **constraints**, such as a minimum or maximum number of suppliers, or only including incumbent suppliers
- Optional **item groups**, or subsets of event items to evaluate. If an optimization scenario has no item groups defined, SAP Ariba Sourcing evaluates all items in the event that contain the term specified in the goal.
  You can use item groups to optimize awards for different subsets of event items. For example, you may have an event with sections for different geographical regions, where each section contains identical items. You can create multiple scenarios, each defining an item group containing a different section so that you can optimize awards per greographic region.

You submit an optimization scenario for evaluation; SAP Ariba Sourcing then determines the appropriate suppliers and award allocations to best meet the specified goal.

SAP Ariba provides preconfigured optimization scenarios, such as **Best bid**, which allocates 100% of each item to the supplier whose bid has the lowest **Total Cost**. Depending on your site configuration and the event, additional scenarios are available, such as **Incumbent suppliers**, which allocates awards to incumbent suppliers only.

You can also create custom optimization scenarios with a goal and optional constraints and item groups. The scenario goals available when creating custom optimization scenarios are derived from the rollup terms that have ranking order specified in the template.

Custom optimization scenarios in guided sourcing also support the following options:

- *Bulk auto create* option to create item groups based on event sections and *Manually create* option to create item groups
- Natural language-based options for defining constraints

Tips:

- Run an optimization 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.
- 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.

> **Restriction**
>
> - Custom optimization scenarios in guided sourcing do not support optimization scenarios that are based on scoring functions that evaluate supplier bids per item.
> - You cannot create a new optimization scenario for guided sourcing events that have more than 100 invited suppliers.

Procedure

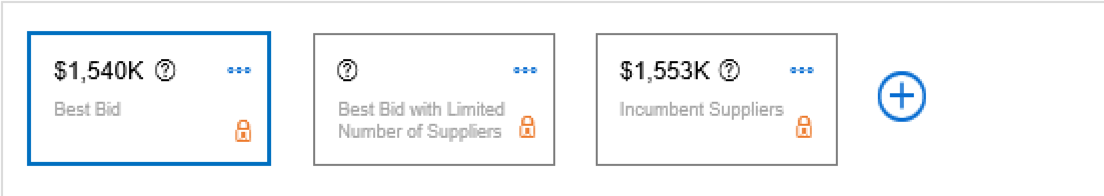
1. From any of the following locations, select the event for which you want to award the lots or line items:
   - **For you** > **Recently viewed**
   - **For you** > **Summary** > **Review responses**
2. If the **Origin** is S/4HANA, review the following details in the **Award confirmation** tab:
   - **Organization name**: The organization name of the awarded participant is displayed.
   - **Award confirmation ID**: The award confirmation ID is displayed.

   > **Note**
   >
   > The **Award confirmation** tab is displayed only if the **Origin** is S/4HANA.

   If the **Origin** is not S/4HANA, skip this step.
3. Navigate to the **Award scenarios** panel.

   If you have bid analysis enabled, select the **Scenario Maker** tab.

   The **Award scenarios** panel shows cards for existing scenarios, including preconfigured optimization scenarios provided by SAP Ariba, such as **Best Bid**.



The current scenario is outlined in blue, and values for the current scenario are shown in the table below the cards.

4. Use one of the following methods to create or edit an optimization scenario:

To...	Complete these steps:
Create a new optimization scenario from scratch	1. Select the **+** (**Create award scenario**) icon to the right of the scenario cards. 2. In the **Create a scenario** popup, select **Create a new optimization scenario** and click **Done**. ⓘ Note Leave the **Name** field in the **Create a scenario** blank. 3. In the **Scenario objective** panel of the **Create scenario** page, enter a name for the scenario you are creating.
Create a new optimization scenario by copying a scenario	1. Locate the card for the scenario you want to copy. Select the more options icon (•••), then select **Copy an existing scenario**. 2. In the **Create a scenario** popup: • Select **Copy an existing scenario**. • Enter a name for the new scenario. • For the **Copy the scenario as** field, select **Optimization scenario**. 3. SAP Ariba creates a new scenario. Locate the card for the scenario you just created. To edit the scenario, select the more options icon (•••), then select **Edit constraints**.
Edit an existing optimization scenario	1. Locate the card for the scenario you want to edit. Select the more options icon (•••), then select **Edit constraints**.

5. In **Scenario objective** panel of the **Create scenario** or **Edit scenario** page, select a goal from the **What is the goal of your scenario** dropdown.

   Based on the rollup terms that have the ranking order specified in the template, you see various options, such as:

   - **Minimize** *term*
   - **Maximize** *term*

   Where *term* is any of the rollup terms that have ranking order (**higher is better** or **lower is better**) specified in the event template.

   > ⓘ Note
   >
   > If your site has grading and scoring [page 613] enabled, you can use the **Maximize score** goal to award each item to the supplier with the response that has the maximum score for that item. The **Maximize score** goal does not consider the overall score for each supplier, so weights assigned to item responses are not relevant. To ensure proper evaluation of scenarios with the **Maximize score** goal, grading and scoring

> values must be submitted, including any consensus grades, and the approval for team grading task must be approved.

6. (Optional) From the **Item groups** section, click **Create** to create one or more item groups.

> ⓘ Note
>
> This step is optional because some of the constraints are not applicable for item groups. If there are no item groups, SAP Ariba Sourcing evaluates all items in the event that contain the term specified in the goal.

   From the **Create item groups** page that appears, complete the following steps:

   1. From the **Group settings**, select either **Bulk autocreate** or **Manually create** and select item groups or items as necessary.
      - The **Bulk autocreate** option enables you to create item groups based on the sections to which the items belong. For example, if there are five sections that have multiple items within, five item groups are created by default if you select the top checkbox. However, you can unselect sections for which you do not want to create item groups.
      - The **Manually create** option enables you to manually select items to create a group. All the items you select are added to a single group.
   2. After you select the items or item groups, click **Save** in the top-right corner of the page.
      Create scenario page displays the item groups you created. You can rename the item groups by clicking the *pencil* icon next to the item group in the **Create scenario** page.

7. From the **Define constraints** section, click **Create** and complete the following configuration from the **Create constraints** page:
   a. From the **What do you want to do?** dropdown, click the *search* icon and select any of the following options:
      - **Award [quantity] of [items] to [suppliers]**
      - **Award [percentage] of amount of [items] to [suppliers]**
      - **Award [count] suppliers to [items] from [suppliers]**
      - **Award [quantity] of all items to [suppliers]**

      The entries in square brackets ([]) indicate variables. [items] are replaced by the item groups you select and [suppliers] by suppliers who meet the criteria you specify.
   b. From the **Select values to the constraint** options, select:

Quantity	Specify the quantity (**at least**, **at most**, or **exact**), in percentage terms, that you want to award.
Item groups	Select one or more item groups to which this constraint applies.

Suppliers	Select one of the following options: • **All suppliers** • **Incumbents** • **Selected suppliers** - if you select this option, you can view the list of all suppliers in the event and select one or more suppliers from the list. • **Suppliers matching criteria** - if you select this option, you can specify the supplier filter criteria such as **RFX answer criteria**, **Term criteria**, or **Profile criteria** from the **Criteria** tab and select from the list of suppliers that appears in the **Matching suppliers** tab. • **Participants bid on all items** - if you select this option, you can view the list of suppliers who have submitted bids for all items in the event and select suppliers from the list.

c. Select **Save** button on the top-right corner of the page.

The **Create Scenario** or **Edit Scenario** page displays the constraints.

8. Select **Optimize** to submit the scenario for evaluation.
The table below the scenario cards on the the **Award Scenarios** page show the allocations for your scenario, as determined by SAP Ariba.
9. **Optional:** Choose **Compare scenario** and select two or more scenarios that you want to compare.

> ⓘ Note
>
> You can select a maximum of six scenarios for comparison.

a. After you select the scenarios that you want to compare, choose **Compare scenario**.

The **Compare scenario** page appears and displays the summary of the selected scenarios.

The selected scenarios are listed in the top right-hand corner of the page. You can remove any of the scenarios from the comparison by choosing the **x** button next to the scenario name.

To close the **Compare scenario** page, choose **Cancel**.

10. Choose the scenario you want to award by selecting the corresponding scenario card.
11. Select **Award**.
12. Choose whether to send email notifications to participants who are getting awards and to participants who aren't getting awards.

You can optionally select **Customize Award Emails** to customize the email notifications. See Event Notification Template Variables [page 576] for descriptions of the variables used in email notifications.

> ⓘ Note
>
> If an awarded supplier is not registered on SAP Business Network, no notification is sent to the supplier until the supplier is registered on SAP Business Network and has an SAP Business Network ID.

13. **Optional:** If the event is configured for integration with an external system, select one of the following options for **Do you want to create follow-on documents?**
    - **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
      Based on the values you specified in the **Allow integration types** field in the guided sourcing event template, the **Integration Type** field in the **Confirm award** dialog box displays the follow-on document type:
        - Only one follow-on document type is displayed for a single award.
        - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

      > ⓘ Note
      >
      > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. When you click **Show Details**, more details are displayed.
    - **No, not now** if you do not want to create a follow-on document based on the award.

    > ⓘ Note
    >
    > The **Do you want to create follow-on documents?** option is not available for events that have the award approval task enabled.
    >
    > The option to create a Purchase Information Report (PIR) document is available only for events created from templates with the rule **Allow users to accept a supplier's price as** set to **Contracted Price**. You cannot create a PIR when this rule is set to **Estimated Price**.
14. Select **Confirm**.

    A success message shows the total savings and the number of items awarded. If you chose to send award information to an external system to create a follow-on document, the message also indicates that the selected follow-on document is created.
15. **Optional:** To send award scenario information to an external system, click **Send prices to external system**.

    The **Send prices to external system** dialog box is displayed.

    Based on the values you specified for the **Allow integration types** drop-down in the guided sourcing event template, the **Integration Type** field in the **Send prices to external system** dialog box displays the follow-on document type:
    - Only one follow-on document type is displayed for a single award.
    - A list of follow-on document types are displayed in case of a split award. Select a follow-on document as required.

    > ⓘ Note
    >
    > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. To display more details, click **Show Details**.
16. Click **Confirm**.

Task overview: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]
Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]
Using Bid Analysis to Award Guided Sourcing Events [page 530]
Grading-Based Item Awards in Guided Sourcing events [page 537]
Viewing Associated Contracts for Guided Sourcing Events [page 538]

Using Bid Analysis to Award Guided Sourcing Events

You can create a single award or create split awards in guided sourcing from the **Award scenarios** > **Bid Analysis** tab in a click of a button. To award suppliers from the **Bid Analysis** tab, you must enable the bid analysis feature in your site. See Bid Analysis in the Event Management Guide.

You can also specify range filters to display bid data in the **Award scenarios** > **Bid Analysis** tab. See Manage Filters in Bid Analysis in the Event Management Guide.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must ensure that the following parameter is enabled in the **Manage** > **Administration** > **Intelligent Configuration Manager** page of the SAP Ariba Sourcing solution: `Application.ACM.EnableBidAnalysisTab`. See Enable bid analysis tab for buyers in the Intelligent Configuration Manager Parameters Reference guide.
- You must have either **optimization workbench admin** or **optimization workbench user** permissions to be able to use the bid analysis options in SAP Ariba Sourcing.

Creating a single award

You can award an event with line items to a supplier by using the **Award** button available for each supplier in the table view of the supplier bid responses in the **Award scenarios** > **Bid Analysis** tab. You can choose to award all items to a supplier or award specific items to a supplier. To award a supplier for specific items, select the items by using the item filter and then click the **Award** button available for the specific supplier you want to award to.

When you award a supplier from the **Award scenarios** > **Bid Analysis** tab, a manual scenario is automatically created for the awarded supplier. You can view the details of the manual scenario in the **Award scenarios** > **Scenario Maker** tab.

> **Note**
>
> By default, the percentage allocated for each awarded item in the manual scenario is 100 percent.

Creating split awards

You can award an event with line items to multiple suppliers. To award a line item to multiple suppliers, you can split the award allocation across different suppliers based on percentage or quantity.

> **Note**
>
> The guided sourcing event must be in the review response state for you to allocate the line-item award to multiple suppliers.

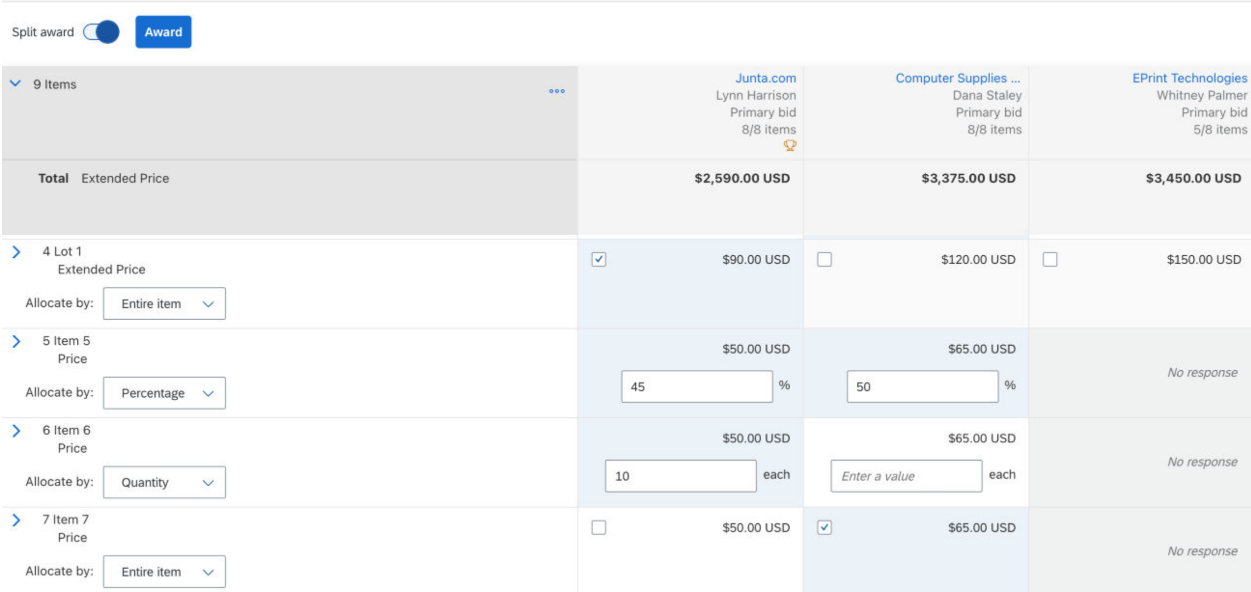
To split the line-item award, you must enable the **Split award** toggle available in the table view of the **Award scenarios** > **Bid Analysis** tab. When you enable the **Split award** toggle:

- an **Award** button is displayed next to the **Split award** toggle
- an **Allocate by** dropdown appears for each line item in the line items table

> **Note**
>
> When you enable the **Split award** toggle, the **Award** button will no longer be visible for each supplier in the line items table. Instead, a single **Award** button will be visible next to the **Split award** toggle.

You can use the **Allocate by** dropdown to split the line-item award among different suppliers based on percentage or quantity. Following options are available in the **Allocate by** dropdown:

- **Entire item**: By default, the **Allocate by** dropdown is set to **Entire item** for each line item. Choose **Entire item** when you want to award the line item to a single supplier.
- **Percentage**: Select **Percentage** in the **Allocate by** dropdown to allocate a line item to multiple suppliers based on percentage.
- **Quantity**: Select **Quantity** in the **Allocate by** dropdown to allocate a line item to multiple suppliers based on quantity. You can allocate a portion of the total quantity to each of the suppliers.

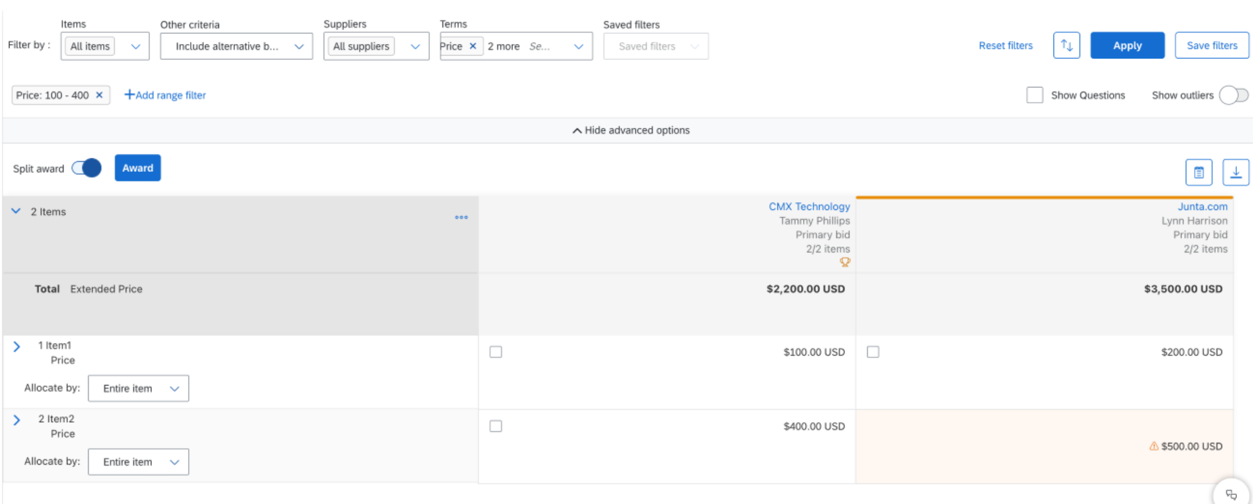


After allocating a line item to multiple suppliers based on percentage or quantity, you can create an award for the line item by selecting the **Award** button that appears next to the **Split award** toggle.

Creating an award automatically creates an award scenario. You can view the details of the awarded scenario in the **Award scenarios** > **Scenario Maker** tab.

Specifying range filters

When you enable the **Split award** toggle with the range filters specified, bids that do not match the specified range are highlighted in orange in the line items table. You cannot allocate these bids to any supplier.



Restriction

If you enable the **Split award** toggle when the range filters are specified to display bid data in the **Award scenarios** > **Bid Analysis** tab, bids that do not match the specified range are highlighted in orange in the line items table. You cannot allocate these bids to any supplier.

Parent topic: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]
Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]
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Creating a Single Award from the Bid Analysis Interface in Guided Sourcing

Use this procedure to create a single award from the bid analysis interface.

Context

You can create an award from the bid analysis interface of the guided sourcing event. Creating an award from the bid analysis interface automatically generates a manual scenario for the awarded supplier.

Procedure

1. From the **Award scenarios** section of the event, select the **Bid Analysis** tab.
2. Select the items using the items filter.
3. In the table view of the supplier bid responses, click **Award** for the specific supplier you want to award to.

   The **Confirm award** dialog box appears.
4. Review the award details such as the name of the awarded supplier and the total number of selected items.
5. In the **Confirm award** dialog, select either or both of the following options for **Would you like the system to send email notifications?**:
   - **Yes, email the suppliers who got an award**
   - **Yes, email the suppliers who didn't get an award**
6. If your site is integrated with an external system (or is integrated with multiple external systems and an external system is selected in the **External system** event field), select one of the following options for **Do you want to create follow-on documents?**

- **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
  The **Integration Type** field in the **Confirm award** dialog box displays the follow-on document type that you selected from the **Allow integration types** drop-down in the guided sourcing event template.

  > ⓘ Note
  >
  > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. When you click **Show Details**, more details are displayed.

- **No, not now** if you do not want to create a follow-on document based on the award.

7. If you selected **Yes** in the previous step, select the follow-on document that you want to create in the integrated external system from the **Allow integration types** list and click **Confirm**.

   A success message appears to indicate that the selected follow-on document is created. The message also displays the total savings and the number of items awarded.

   > ⓘ Note
   >
   > If an awarded supplier is not registered on SAP Business Network, no update is sent to such supplier until the supplier is registered on SAP Business Network and has an AN ID.

8. To send award scenario information to an external system, click **Send prices to external system**.

   The **Send prices to external system** dialog box is displayed.

   The **Integration Type** field in the **Send prices to external system** dialog box displays the follow-on document type that you selected from the **Allow integration types** drop-down in the guided sourcing event template.

   > ⓘ Note
   >
   > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. To display more details, click **Show Details**.

9. Click **Confirm**.
10. Click **Stay**.

Results

A manual scenario is created. Buyers can view the details of the manual scenario in the **Scenario Maker** tab.

Creating Split Awards from the Bid Analysis Interface in Guided Sourcing

Use this procedure to create split awards from the bid analysis interface.

Context

You can create split awards from the bid analysis interface of the guided sourcing event. Creating split awards from the bid analysis interface automatically generates an award scenario for the awarded supplier.

Procedure

1. From the **Award scenarios** section of the event, select the **Bid Analysis** tab.
2. (Optional) Specify range filters for items using the item filters.
3. Enable **Split award**.

   A **Allocate by** dropdown appears for each line item in the table view of the supplier bid responses.
4. Select one of the following options in the **Allocate by** dropdown to split the line-item award among different suppliers based on percentage or quantity:
   - **Entire item**: Select **Entire item** when you want to award the line item to a single supplier.
   - **Percentage**: Select **Percentage** to allocate a line item to multiple suppliers based on percentage.
   - **Quantity**: Select **Quantity** to allocate a line item to multiple suppliers based on quantity. You can allocate a portion of the total quantity to each of the suppliers.
5. Enter the allocations in the line items table based on the selected option in the **Allocate by** dropdown for each line item.
   - If you've selected **Entire item**, select the checkbox of the supplier in the line items table to who you want to award the item to.
   - If you've selected **Percentage**, enter you allocations in the text field that appears for suppliers in the line items table.
   - If you've selected **Quantity**, enter you allocations in the text field that appears for suppliers in the line items table.
6. Click the **Award** button that appears next to the **Split award** toggle.

   The **Confirm award** dialog box appears.
7. In the **Confirm award** dialog, select either or both of the following options for **Would you like the system to send email notifications?**:
   - **Yes, email the suppliers who got an award**
   - **Yes, email the suppliers who didn't get an award**
8. If your site is integrated with an external system (or is integrated with multiple external systems and an external system is selected in the **External system** event field), select one of the following options for **Do you want to create follow-on documents?**

- **Yes** to create a follow-on document in the integrated external system such as SAP ERP.
  The **Integration Type** field in the **Confirm award** dialog box displays a list of follow-on document types based on the values you specified from the **Allow integration types** drop-down in the guided sourcing event template.

  > ⓘ Note
  >
  > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. When you click **Show Details**, more details are displayed.

- **No, not now** if you do not want to create a follow-on document based on the award.

9. If you selected **Yes** in the previous step, select the follow-on document that you want to create in the integrated external system from the **Allow integration types** list and click **Confirm**.

   A success message appears to indicate that the selected follow-on document is created. The message also displays the total savings and the number of items awarded.

   > ⓘ Note
   >
   > If an awarded supplier is not registered on SAP Business Network, no update is sent to such supplier until the supplier is registered on SAP Business Network and has an AN ID.

10. To send prices to an external system, click **Send prices to external system**.

    The **Send prices to external system** dialog box is displayed.

    The **Integration Type** field in the **Send prices to external system** dialog box displays a list of follow-on document types based on the values you specified from the **Allow integration types** drop-down in the guided sourcing event template.

    > ⓘ Note
    >
    > If no values are selected from the **Allow integration types** drop-down in the guided sourcing event template, a message appears to indicate that you can't create a follow-on document. To display more details, click **Show Details**.

11. Select a follow-on document as required.
12. Click **Confirm**.
13. Click **Stay**.

Results

An award scenario is created. You can view the details of the award scenario in the **Scenario Maker** tab.

Grading-Based Item Awards in Guided Sourcing events

The grading-based item award feature enables you to apply the following restrictions for awarding items:

- **Items that are rejected by the technical evaluation team can't be awarded.**
  If an item receives a very low grade, it is rejected by the technical evaluation team and should not be awarded. You can enable the **Prevent awarding items that don't meet the grading threshold** event rule to prevent items that are rejected by the technical evaluation team from being awarded.
  You can set a **Target grade** for sections and items on the **Set grading weight** page when you create a guided sourcing event. The **Target grade** is the grading threshold that sections and items must meet. If an item doesn't meet its grading threshold. it can't be awarded. If you import an award scenario from a Microsoft Excel file, allocations to items that don't meet the grading threshold are considered as invalid data and are ignored.

  > Note
  >
  > Target grades do not apply to terms.

  We recommended that you set **Target grade** for an item or section to a value that is less than or equal to **Overall weight** of that item or section. This is because the **Total grade** of an item is calculated using the following formula:
  Total grade of an item = Sum (Grade of each term x Overall weight of each term)
  From this formula, we can infer that the **Total grade** of an item will never be greater than the **Overall weight**. If you set **Target grade** to a value greater than the **Overall weight**, the **Total grade** will never meet the **Target grade** requirement, and the item can never be awarded.

  > Note
  >
  > The **Target grade** supports decimal values and is rounded to two decimal places.

- **Items can't be awarded if consensus grades are not submitted.**
  You can enable the **Must owner submit consensus grades before awarding items?** event rule to prevent items from being awarded if project owners or event administrators don't submit consensus grades to show that they have reviewed and approved the grades that are provided by team graders.
  If you edit and update a guided sourcing event after you have submitted the consensus grades, you need to do the **Review for Team Grading** task, **Approval for Team Grading** task, and consensus grading for a new round.

To apply the preceding restrictions, your site must:

- Have the grading and scoring feature enabled. For details, refer to Grading and Scoring in Guided Sourcing Events [page 613].
- Have the ICM parameter **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) set to **Yes**.
- Have either or both of the event rules **Prevent awarding items that don't meet the grading threshold** and **Must owner submit consensus grades before awarding items?** set to **Yes**, depending on the restriction that you want to apply.

.

Event rules for the grading-based item award feature

Prevent awarding items that don't meet the grading threshold

This rule prevents buyers from awarding items that do not meet the grading threshold. Buyers preset the grading threshold (**Target grade**) when they create a guided sourcing event. After graders complete their grading work, guided sourcing compares the **Total grade** that an item received from the graders with the preset **Target grade**. If the **Total grade** is lower than the **Target grade**, the item is not awardable.

This rule appears only when the ICM parameter **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) and the **Enable scoring on participant responses** event rule are both set to **Yes**.

Must owner submit consensus grades before awarding items?

This rule determines whether project owners need to submit consensus grades on event items before they award the items. If you select **Yes**, project owners must submit consensus grades first before they can award the items.

This rule appears only when the ICM paramter **Enable grading-based item award** (`Application.ACM.EnableGradingBasedItemAward`) and the **Enable scoring on participant responses** event rule are both set to **Yes**.

Parent topic: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
Using Manual Award Scenarios to Award Guided Sourcing Events [page 516]
Using Manual Award Scenarios and Excel to Award Guided Sourcing Events [page 520]
Using Optimization Scenarios to Award Guided Sourcing Events [page 524]
Using Bid Analysis to Award Guided Sourcing Events [page 530]
Viewing Associated Contracts for Guided Sourcing Events [page 538]

Viewing Associated Contracts for Guided Sourcing Events

Use this procedure to view contracts associated with guided sourcing events.

Prerequisites

- Your site must have guided sourcing enabled. For more information, refer to Setting Up Guided Sourcing.

- You must be a member of the **Category Buyer** group
- You must be the event owner or have project owner capabilities for the event.
- You must have an award for a guided sourcing event.
- 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 contract workspaces, such as the **Contract Manager** group.
- If the sourcing event from which you want to create or update a contract is initiated by an RFQ from an external system and contains service outline attributes, ensure that you have enabled the **Enable Export of Service Outline Attributes from Sourcing to Contract** (`Application.ACM.ExportOutlineAttributesFromSourcingToContract`) parameter. For more information about the parameter, refer to Enable Export of Service Outline Attributes from SAP Ariba Sourcing to SAP Ariba Contracts.

Context

As a buyer, you can get information about the contracts associated with a guided sourcing event on the **Awards** page of the event.

Procedure

1. In the monitor page of the guided sourcing event, select the **Award** tab.
2. Go to the **Associated Contracts** tab to find details of all the contracts that are associated with the guided sourcing event.

   The contract information includes the following:

   Contract Id

   Title

   Supplier

   Expiration Date

   Effective Date

   Contract Status

   Icertis ID - This column is shown only to customers who have integrated their SAP Ariba Contracts instance with Icertis Contract Intelligence (ICI) for SAP Ariba Solutions. For more information about integrating SAP Ariba Contracts with ICI, refer to Integrating SAP Ariba Contracts with Icertis Contract Intelligence for SAP Ariba Solutions.

   The table displays all contracts that you create or update from the event. However, an updated contract is shown in the table only if it's not associated with any other event.

Next Steps

After reviewing the contract information, determine whether you want to create a new contract or update an existing contract for the awarded line items.

Task overview: Review Responses and Award Creation for Guided Sourcing Events [page 513]

Related Information

Guided Sourcing Award Scenarios Panel [page 515]
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Grading-Based Item Awards in Guided Sourcing events [page 537]

Communication and Messaging in Guided Sourcing

Guided sourcing provides multiple ways for you to communicate with internal users and supplier contacts.

With guided sourcing, you can view messages from and send messages to internal users and supplier contacts using:

- The project message board. Use this to post announcements, ask questions, share ideas with other team members, or communicate with external users (such as suppliers and external collaborators) in guided sourcing **full** projects. To open the project message board, click the **Message board** panel in the header of guided sourcing full projects. For more information, refer to About the Project Message Board in Guided Sourcing Full Projects [page 542].
- The event message board. Use this to view automated event messages (such as event invitations) and to send messages to event team members or participants. To open the event message board for the event that is in the monitor, review responses, or award phase, click the **Messages** tab. For more information, see About the Event Message Board in Guided Sourcing [page 551].
- The **Messages** popup. Use this to send messages to internal users and supplier contacts and to view messages that were sent using the popup in the same event. To open the **Messages** popup, click the messages icon ( ) near the lower-right corner of the page. For more information, see About the Messages Popup [page 564].

> Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.
>
> All messages exchanged using the messaging popup are stored in the SAP Ariba data center located in the United States, regardless of the data center your organization selected to host your SAP Ariba Sourcing solution.

About the Project Message Board in Guided Sourcing Full Projects [page 542]

About the Event Message Board in Guided Sourcing [page 551]

About the Messages Popup [page 564]

About Dragging and Dropping Message Attachment into a Guided Sourcing Event [page 568]

About the Project Message Board in Guided Sourcing Full Projects

The project message board in guided sourcing full projects enables you to communicate with project team members and participants efficiently and transparently. Messages and replies are sent in real time and are visible to all team members.

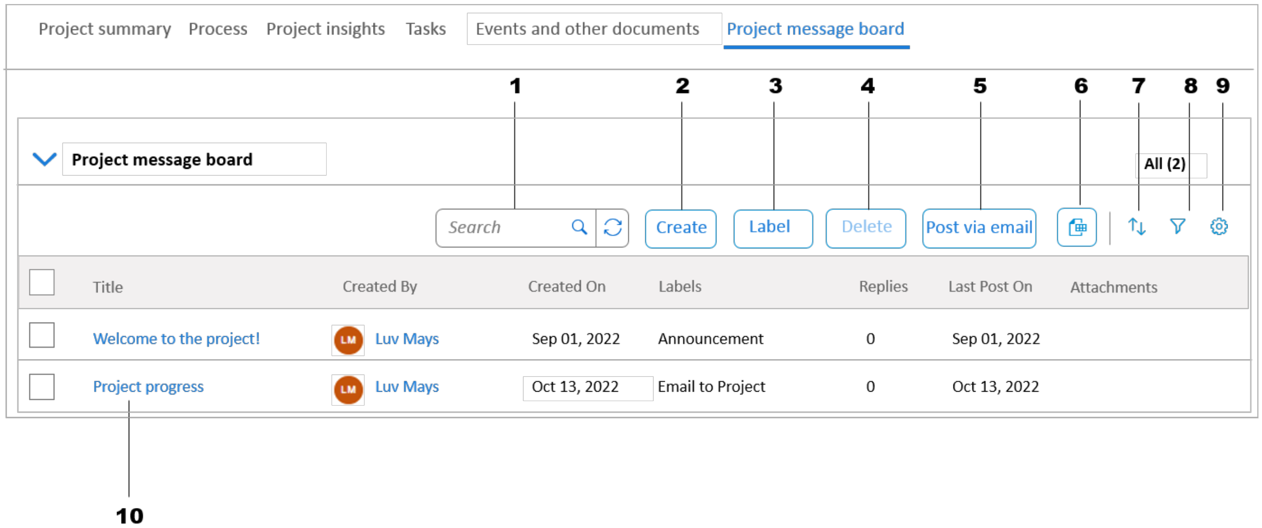
On the project message board, you can:

- Create, view, and reply to messages.
- Create messages and post replies using email.
  Each project message board has a unique email address. Internal and external users who know this address can post messages to the corresponding project message board through email.
  After receiving an email message, guided sourcing creates a new message or adds the message as a reply to an existing message, based on the subject field of the email message. If the subject field of the email message is different from all existing message titles, guided sourcing considers this email message as a new message and creates a message titled with the subject field of the email message. If the subject field of the email message is the same as any existing message title, guided sourcing considers this email message as a reply to an existing message.
  Guided sourcing also recognizes the reply prefixes (for example, **RE:**, **Re:** or **re:**) used by most mailers and can link reply email messages to the appropriate message.
  Each project message board email address is unique and includes text based on a random number to prevent unauthorized users from predicting email addresses. Project team members can view the email address for a project message board by clicking the **Post via email** button in the upper-right corner of the **Message board** table. and provide the address to external users.

  > Note
  >
  > Although users can reply to posts in the message board using email, the message board does not send emails.

- Export all or specific messages to a Microsoft Excel file.
- Tag messages with one or more labels and filter messages by label.
  You can use labels to identify and filter messages. By default, all project message boards contain the **Announcement**, **High Priority**, and **Email to Project** labels. These labels are reserved and cannot be deleted. You can also customize labels based on your needs.
- Include file attachments in messages and replies.
- Download file attachments.
- Copy message attachments to projects or subprojects.
- Unzip the message attachments.

The following figure shows an example of the project message board panel:



1. Enter search terms to search for messages.
2. Create a message.
3. Apply and manage labels.
4. Delete one or more messages.
5. Display the email address for the project message board.
6. Export one or more messages to a Microsoft Excel file.
7. Sort messages..
8. Define message filter using field values.
9. Select columns to show.
10. Click the title of a message to open and view the message.

ⓘ Note

Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.

Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Creating a Message with the Project Message Board in Guided Sourcing Full Projects

Use this procedure to create a message that includes text only, or a message that has a file attached. You can also associate a message with one or more labels to facilitate other team members to find the message effectively.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

> ⓘ Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. At the upper left corner of the **Message board** table, click **Create** to open the **Create message** dialog box.
3. Enter a title for the message.
4. **Optional:** To add a file attachment, drag a file to the **Attachment** area or click **Browse** to select a file.
5. **Optional:** Select one or more labels for the message from the drop-down list in the **Label** field.
6. Enter the message content in the **Message** field.
7. Click **Save** to save your message.

Viewing and Replying to Messages from the Project Message Board in Guided Sourcing Full Projects

Use this procedure to view and reply a message on the **Message board** panel by clicking the message title and post replies to the message when you open the message.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

> Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. In the **Message board** table, click the title of the message that you want to view.

   The message details page opens, displaying the original post and all the replies.
3. **Optional:** Click **Reply** to post a reply to the message or a reply.

   You can add an attachment to the reply by clicking **Attach a file**.
4. When you finish viewing or replying to the message, click **Close** to close the page and return to the message board.

Using Email to Post a Message or a Reply to the Project Message Board in Guided Sourcing Full Projects

Use this procedure to post messages and replies to the message board of guided sourcing full projects by sending emails to the address for the project message board.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

The subject field of the email message is used as the message title. If the email message has no topic, the text (**no title**) is used as the message title. If the message already exists in the message board, the SAP Ariba solution posts the content and any attachments as replies to the topic.

The message board recognizes the prefixes most mailers add to a subject to indicate replies (**RE:**, **Re:** or **re:**, followed by a space) and adds replies to the original message in the message board. For example, the SAP Ariba solution adds a message with the subject **RE: New Contact** to the message titled with **New Contact**.

> Note
>
> - The message board rejects email messages larger than 10 megabytes.
> - Although users can reply to posts in the message board using email, the message board does not send emails.
> - Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
> - Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. At the upper left corner of the **Message board** table, click the **Post via email** button to obtain the email address for the project message board.
3. Click the email address to open the email utility configured for your internet browser.

4. To post a reply to an existing topic in the message board, specify the topic name in the email subject field. To create a new topic, specify the new topic name in the subject field.
5. **Optional:** Attach a file.
6. Send the email message.

Deleting a Message or a Reply from the Project Message Board in Guided Sourcing Full Projects

Use this procedure to delete a message or a reply from the project message board. There are two ways to delete messages from the project message board. The ways available to you depend on whether you are the project owner or the creator of the message.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. Delete a message as follows:
    - If you are a project owner, use either of the following methods to delete a message:
        - Select the messages you want to delete, and click **Delete** in the upper left corner of the **Message board** table.
        - Click a message title to open the message, and click **Delete message** on the message details page.
    - If you are not a project owner but a message creator, click a message title to open the message, and click **Delete message** on the message details page.

    > Note
    >
    > If you are neither a project owner nor a message creator, you can't delete the messages.
3. To delete a reply or a reply to a reply, click **Delete this reply**.

Exporting Messages from the Project Message Board in Guided Sourcing Full Projects

Use this procedure to export all or desired messages and replies to a Microsoft Excel file.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. Select one or more messages that you want to export and click the **Excel export** icon ( ) in the upper-right corner of the **Message board** table. Click **Download to Excel**.

   The selected messages are exported to a Microsoft Excel file to your local computer. The first sheet in the Excel file provides a list of the selected messages. In this sheet, you can find the message title, initial message content, message creator, creation time, labels associated with the messages, the number of replies to the messages, and the time when the last reply was posted.

   The subsequent sheets contain replies to each individual messages and are named with the title of each message. You can check the content, creator, and creation time of all replies to a specific message in the sheets.

Applying and Managing Message Labels from the Project Message Board in Guided Sourcing Full Projects

Use this procedure to apply labels to messages to help identify and filter messages.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Context

The labels that you can use include system and customized labels. **Announcement**, **High Priority**, and **Email to Project** are system labels, which are available for all guided sourcing full projects. You can also add customized labels by using the **Manage labels** option.

> ⓘ Note
>
> System labels cannot be deleted or edited.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. To apply labels to messages or to edit labels for messages, perform the following actions:
    a. Select one or more messages that you'd like to apply labels to.
    b. Click **Label** in the upper left corner of the **Message board** table and select **Apply labels** from the drop-down menu.
    c. On the **Apply labels** dialog box, select one or more labels that you'd like to apply to the selected messages.
    d. Click **Save**.
3. To manage labels, for example, to add, edit, or delete labels, perform the following actions:
    a. Click **Label** in the upper left corner of the **Message board** table and select **Manage labels** from the drop-down menu.
    b. **Optional:** On the **Manage labels** dialog box, click **Add a new label** to add a customized label. Enter a name and description in the textbox for the new label, and press **Enter**.

        If you don't want to add the label, press **Esc**.
    c. Click the edit icon ( ) to edit a customized label.
    d. Click the delete icon ( ) to delete a customized label.

        Alternatively, select the customized labels and click **Delete**.

Downloading Message Attachments in Guided Sourcing Full Projects

Use this procedure to download files that are attached to messages or replies on the message board of guided sourcing full projects.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

Procedure

1. Open your guided sourcing full project and click the **Message board** panel.
2. In the **Message board** table, click the message title to open the message that has a file attached.

   If a message has a file attached, the **Attachments** column in the **Message board** table has the attachment icon ( ) displayed.
3. Click the file attachment.

   The file is automatically downloaded to your local device.

Copying Message Attachments to Projects or Subprojects in Guided Sourcing Full Projects

Use this procedure to copy message attachments in the guided sourcing full projects to any of its projects or subprojects. This allows you to organize documents within a full project.

Context

When you create a guided sourcing event, you can choose to create a single-event project or a full project. A single-event project is a sourcing event such as an RFI, RFP, or an Auction (forward or reverse). A full project enables you to create a project with process management capabilities turned on.

You can copy message attachments from the message board to any of the projects or subprojects. This applies only to guided sourcing full projects.

Procedure

1. Create a new guided sourcing full project or open an existing full project.
2. Click the **Message Board** tab.
3. Open the message that contains the attachment you want to copy to another project or another subproject.
4. From the attachment dropdown, select **Copy to Project**.

   The **Copy attachment to Project** window opens.
5. In the **Copy attachment to Project** window, enter the desired name and description for the attachment, and select a destination folder.

   The message attachment is copied to the project or subproject folder that you have selected, with the name that you have given. You can view the attachment under the **Events and other documents** tab.
6. You can notify the other message board users about the copy action by checking the **Announce the creation of this document** option. The notification appears in the **Message Board** section with the **Announcement** label.

Unzipping the Message Attachments in Guided Sourcing Full Projects

Use this procedure to unzip the message attachments in guided sourcing full projects. You can also view the unzip status of the message attachments.

Context

You can unzip any message attachments that have a *.zip extension.

Procedure

1. Create a new guided sourcing full project or open an existing full project.
2. Click the **Message Board** tab.
3. Open the message that contains the attachment you want to unzip.
4. From the attachment dropdown, select **Unzip content to Project**.
5. The message attachment is unzipped and copied to the **Events and other documents** section of the full project.
6. After you unzip the attachment, you can view the unzip status using the **View unzip status** option in the attachment dropdown.
    a. Click **Refresh** to view the updated details of the unzip task.
    b. Click **Done** to navigate back to the message attachment.

About the Event Message Board in Guided Sourcing

The **Messages** tab contains the event message board, with all automated notifications (such as event invitations) for an event. You can also create and exchange messages with event team members and participants.

> ⓘ Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Messages you receive from the message board also display in your browser window when you're viewing the event. Messages in the message board are also sent to each recipient's regular email address.

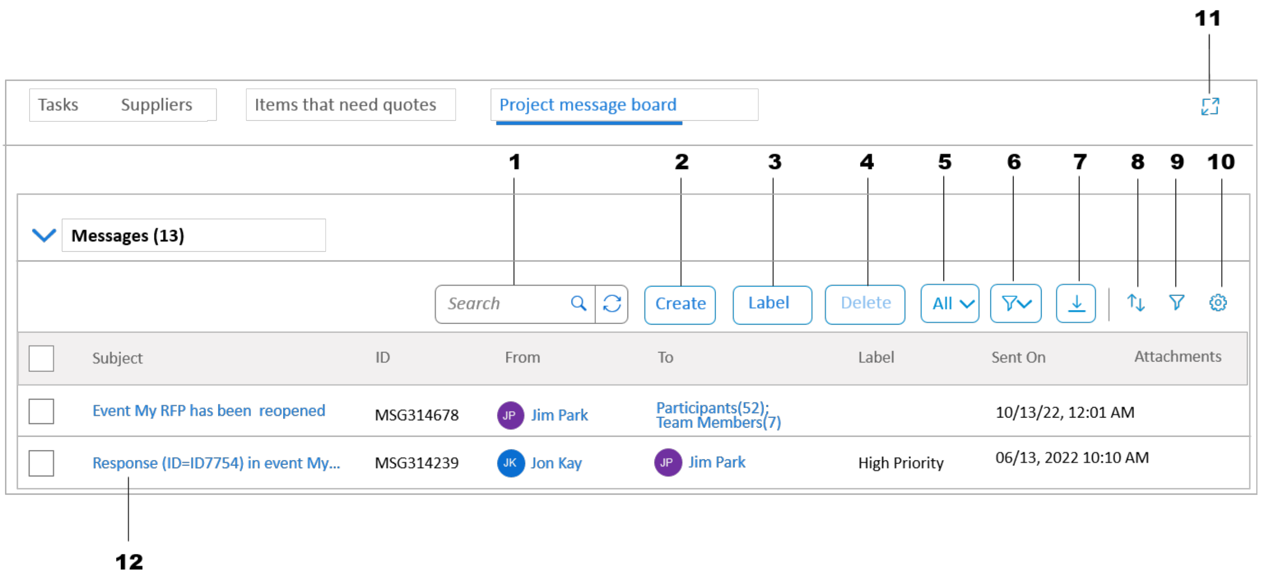
The event message board enables you to:

- View all automated (system-generated) notifications (such as event invitations) for the event, and to view responses to these notifications, including participant responses.
- Compose new messages and send them to all or selected team members and all active participants in an event.
- View messages from the **Open** status until the **Completed** status of an event. When an event is in the monitor, review responses, or award phase, system-generated messages and messages and responses from team members and participants are displayed in the event message board.
  The suppliers who are added later to a guided sourcing event can view all previously exchanged event messages by enabling the event message board rule, **Allow newly added suppliers to view previously exchanged event messages**, in a guided sourcing template or in the **Set event rules** page for a guided sourcing event. If you cannot see the **Allow newly added suppliers to view previously exchanged event messages** rule in the **Set event rules** page in an event, contact a member in the **Template Creator** group to delegate this rule in the event template.
- Post replies to all event messages and to suppliers' responses.
- Include attachments of less than 100 MB file size in messages and replies. There are no restrictions on the number of attachments.
- Create and assign labels to identify and filter related messages.
- Search for messages using keywords.
- Download messages associated with an event to a Microsoft Excel spreadsheet, including message attachments.
- Delete messages from the event message board, if you have permission to delete them.
- View messages deleted from the message component view.

You can edit the guided sourcing event message rules in the Message Board section of the guided sourcing templates. For more information about the event message rules, see Guided Sourcing Message Board Event Rules in the *Setting up guided sourcing* guide.

You can also edit the templates used to generate automated messages. See About Automatic Event Notifications [page 571].

The following figure shows an example of the event message board panel:



1. Enter search terms to search for messages.
2. Create a message.
3. Apply and manage labels.
4. Delete one or more messages.
5. Filter messages based on type of sender (system, user, participant) or recipient.
6. Filter messages based on labels.
7. Export one or more messages to a Microsoft Excel file.
8. Sort messages.
9. Define message filter using field values.
10. Select columns to show.
11. Expand event message board to full page.
12. Click the title of a message to open and view the message.

Viewing Event Messages in Guided Sourcing

You can view all event messages, such as system-generated messages, messages and responses from team members and participants in the **Messages** panel.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event must be published.

Context

> ⓘ Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.

Procedure

1. Locate your guided sourcing event from the For You dashboard [page 65] or the **Sourcing** tab.
   Click the event name to open the event.
2. Click the **Messages** tab.
3. **Optional:** Use the toolbar to find or filter messages.

To perform this action	Select this icon
Search for messages that match text in the subject, contents, attachment file, or the name of the sender or receiver.	Enter text in the search box and select 🔍
Filter messages by type of sender (system, user, participant) or recipient.	**All**⌄ • Select the **Messages from team members** checkbox to filter messages from team members of the event. • Select the **Messages from paticipants** checkbox to filter messages from the event participants. • Select the **Messages from system** checkbox to filter the system-generated messages for the event. • Select the **Messages not from system** checkbox to filter the user-created messages for the event. • Select the **Messages sent** checkbox to filter the event messages sent by the signed in user. ⓘ Note Users can see only the messages sent by them. • Select the **Messages sent to participants** checkbox to filter messages sent to the event participants. • Select the **Messages sent to team members** checkbox to filter messages sent to the team members of the event.
Filter messages by label.	⏷⌄
Sort entries.	↓↑

Create one or more filtering statements that include or exclude entries based on column values.	When filtering text-based column values, letter case is ignored (uppercase and lowercase characters match). There are no wildcard characters; all characters are interpreted literally (quote marks and asterisks have no special meaning).
Choose columns to show or hide.	

4. In the **Messages** panel, click a message subject from the **Subject** column.

   The message popup opens, displaying the message details.
5. When you finish viewing the message, click **Cancel** to close the popup and return to the **Messages** page.

Creating New Event Messages in Guided Sourcing

Use this procedure to create new event messages.

Prerequisites

- The event must be configured to allow messages between the buyer project team and event participants and enable buyers to compose new messages or reply to existing messages. Buyers continue to get automatic event notifications even without this configuration.
- To enable buyers to send messages to selected participants only, your administrator must enable the ICM parameter **Allow messages to be sent to specific participants, rather than all participants** (`Application.AQS.EnablePrivateMessaging`) . For more information about the ICM parameter, refer to Allow messages to be sent to specific participants, rather than all participants.

Context

You can create event messages and attach multiple files to messages in the **Messages** tab. The guided sourcing event must be in the monitor, review responses, or award phase.

> Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. In the **Messages** panel, click the **Create** button.

   The **Create new message** popup opens.
7. From the **To** list, select recipients.
8. In the **Subject** box, enter the subject.
9. From the **Label** list, select labels to associate the message.

   > Note
   >
   > Tagging a message with the **Public Q&A** label allows public sector buyers to publish the message on the **Q&A** section of the Public Access page of the event.
10. In the **Attachment** field, you can either drag the file or click **browse** and select the file you want to attach.

    You can attach multiple files of size less than 100 MB.
11. Type your message and click **Send**.

Forwarding Event Messages in Guided Sourcing

Event messages can be forwarded to team members in a guided sourcing event that is in the monitor, review responses, or award phase.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must use a guided sourcing event template with the event rule **Allow buyers to forward messages to team members** set to **Yes** or **Delegated**.
- You must be the event owner or have project owner capabilities for the event.
- The event must be published.

Context

You can open an event message from the **Messages** tab and forward the message to team members in a guided sourcing event. However, you cannot forward event messages to participants. You can add or delete attachments from an event while forwarding the event message.

While replying to forwarded messages, you cannot add participants as recipients.

> **Note**
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Click the **Messages** tab.
2. In the **Messages** panel, click a message subject from the **Subject** column.

   The message popup displays.
3. Click **Forward** to forward the message.

   The **Forward** popup opens.
4. From the **To** list, select the recipient. You can forward messages only to team members.
5. Modify the email subject from the **Subject** box.
6. From the **Label** list, select labels to associate with the reply message.
7. If a message has a file attached, it is displayed in the **Attachment** field in the current message. You can forward the attachment.

   To download an attachment, click the file name hyperlink to the right of the **Attachment** field. The file is downloaded to your local device.

   You can also add additional attachments. To add attachments, either drag and drop the file or click **browse** and select the file you want to attach. You can attach multiple files of less than 100 MB in size.

   You can remove attachments by clicking the delete icon ().
8. Enter your response.
9. Click **Send**.

Replying to Event Messages in Guided Sourcing

Use this procedure to reply to event messages.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- Buyers must configure the event to allow messages between the buyer project team and event participants. If buyers do not allow messages, you can still view automatic event notifications, but you cannot compose new messages or reply to existing messages.
- You must be the event owner or have project owner capabilities for the event.
- The event must be published.

Context

When viewing a message, you can respond to team members and participants in a guided sourcing event from the **Messages** tab for the event. Event owners and project owners can reply to event messages sent by event owners, project owners, and suppliers. Suppliers cannot reply to event messages. Event messages can be responded from the **Messages** tab for a guided sourcing event that is in the monitor, review responses, or award phase.

Event owners and project owners can reply to system-generated messages for the following event level activities only:

- Event suspended
- Lot moves to pending clear state
- Obfuscated message
- Message Delete
- Lot cancelled
- Lot reopened
- Bid is deleted
- Event edited and republished when Bid By Email is enabled
- Lot closing time extended/reduced
- Bid is Rejected
- Awarding
- Event cancelled
- Event resumed
- Event edited and republished
- Event moves to open state
- Event reopened
- Event prebid closing time extended/reduced
- Bidding ends

- Event paused
- Event closing time extended/reduced
- New round event republish

> ⓘ Note
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.
>
> Do not include sensitive personal data (for example, social security numbers) or personal data (for example, phone numbers) in messages or attachments posted to a project or event message board as defined in the Data clause in the SAP Ariba and Fieldglass Supplemental Terms and Conditions. Message board content is not stored with appropriate data protection measures for personal data.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. In the **Messages** panel, click a message subject from the **Subject** column.

   The message popup displays.
7. Click **Reply** to reply to the message.

   The **Reply to** popup opens.
8. From the **To** list, select the recipient.
9. In the **Subject** box, enter the subject.
10. From the **Label** list, select labels to associate with the reply message.
11. In the **Attachment** field, you can either drag and drop the file or click **browse** and select the file you want to attach.

    You can attach multiple files of size less than 100 MB.
12. Enter your response.
13. Click **Send**.

Creating and Managing Labels in a Guided Sourcing Event

Use this procedure to create and manage labels in a guided sourcing event.

Context

You can create your own labels in addition to the system-generated labels (**system label**) available in the **Messages** tab. You can also edit and delete the labels you created. The **High Priority**, **Participant Question**, **Surrogate Bid**, and **Public Q&A** labels are system-generated labels (**system label**) and cannot be edited or removed from the **Messages** tab. The guided sourcing event must be in the monitor, review responses, or award phase.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. In the **Messages** panel, click **Label** > **Manage Labels**.

   The **Mange labels** popup opens.
7. In the **Manage labels** popup:
   - To create a new label in the **Messages** tab:
     1. Click **Add a new label** to add a row in the **Mange labels** popup.
     2. Enter a name and description for the new label.
     3. Click the tick mark ( ) on the right side of the row **Description**. Alternatively, click the cancel icon ( ) to cancel the changes.
   - To edit a label name and description:
     1. Click the edit icon ( ) corresponding to the label name.
     2. Update the name and description of the label.
   - To delete a label from the **Messages** tab, click the delete icon ( ) corresponding to the label name.
   - To delete multiple labels from the **Messages** tab, select the labels and click **Delete**.
8. Click **Save**.

Associating Messages with One or More Labels in a Guided Sourcing Event

Use this procedure to associate messages with one or more labels in a guided sourcing event.

Context

You can associate messages with one or more labels. Associating a message with a label helps you quickly access all related or relevant messages by clicking the label. The guided sourcing event must be in the monitor, review responses, or award phase.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. In the **Messages** panel, select messages and click **Label** > **Apply labels**.

   The **Apply labels** popup opens.
7. Select the checkboxes corresponding to the **Label** in the **Apply labels** popup to associate the selected messages with labels, .
8. Click **Apply** to save changes.

Dissociating Messages from One or More Labels in a Guided Sourcing Event

Use this procedure to dissociate messages from one or more labels in a guided sourcing event.

Context

You can dissociate messages from one or more labels. The guided sourcing event must be in the monitor, review responses, or award phase.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. In the **Messages** panel, select the messages, and click **Label** > **Apply labels**.

   The **Apply labels** popup opens. If any of the selected messages are associated with labels, the corresponding checkboxes are displayed as selected in the **Apply labels** popup.
7. To dissociate a label, clear the checkbox for the label in the **Apply labels** popup.
8. Click **Apply** to save changes.

Downloading Event Messages and Attachments in Guided Sourcing

Use this procedure to download event messages and attachments.

Context

You can download event messages and attachments from the **Messages** tab. The guided sourcing event must be in the monitor, review responses, or award phase.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. Download messages or attachments.

To download multiple attachments, perform the following steps:

1. In the **Messages** panel, click the **Download** dropdown ( ) and then click **Download all attachments**.
   The **Download Attachments** popup is displayed.
2. Select the attachments you want to download and click **Download**.
   A zip file containing the selected attachments is downloaded.

To download a single attachment, perform one of the following steps:

- Click the hyperlinked number to the right of the attachment icon ( ) in the **Attachment** column.
  If there is a single attachment, the file is downloaded.
  If there are multiple attachments, a popup opens displaying all the attachments.
    - (Optional) If there are multiple attachments, click the attachment you want to download.
- Click the hyperlink in the **Subject** column.
  A popup opens where you can view details of the message.
  In the **Attachments** field, click the attachment you want to download.

To download all messages, perform the following step:

- In the **Messages** panel, click the **Download** dropdown ( ) and then click **Download as Excel**.
  An Excel file containing the messages is downloaded.

Deleting Event Messages in Guided Sourcing

Use this procedure to delete user-created event messages.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be a member of the **Event Administrator** group.

Context

User-created event messages can be deleted from the **Messages** tab for a guided sourcing event that is in the monitor, review responses, or award phase. Event administrators can delete event messages sent by event owners, project owners, and suppliers. Suppliers cannot delete event messages.

> Note
>
> System-generated messages cannot be deleted by users.

Procedure

1. Go to the **For You** dashboard.
2. In the **Quick links** pane, click **RFx**.

   The **Guided sourcing projects** search page opens.
3. Search for the guided sourcing event based on event name or ID by entering text in the **Search for sourcing projects** box and press `Enter` or click the search icon ( ).
4. Click the event ID link to open the guided sourcing event.
5. Click the **Messages** tab.
6. On the **Messages** panel, select the checkbox for the message you want to delete, and click **Delete**.

   To delete multiple event messages simultaneously, on the **Messages** panel, select the checkboxes for the messages you want to delete, and click **Delete**.

   > Note
   >
   > If your selection includes a system-generated message, the **Delete** button will be disabled.

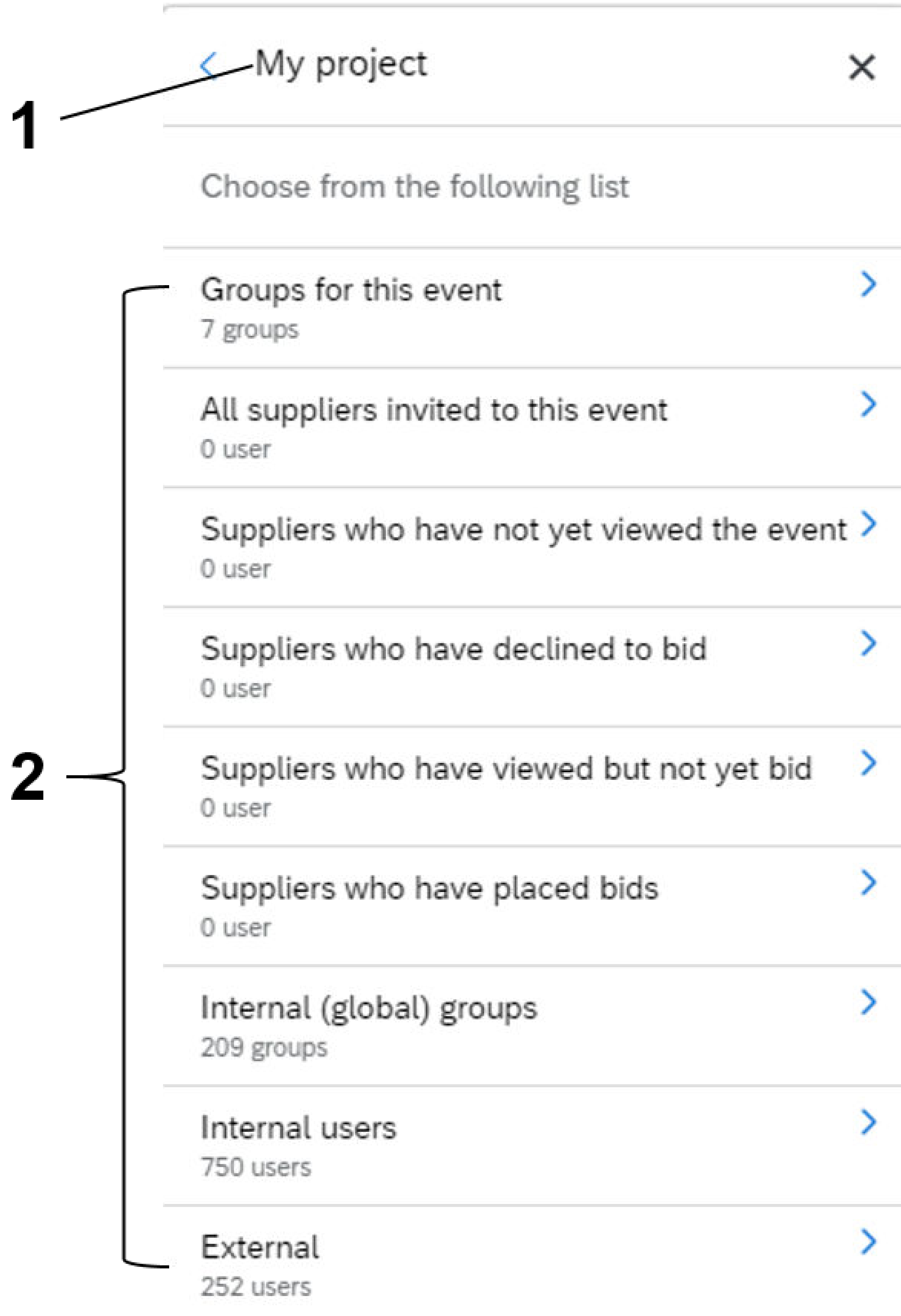
About the Messages Popup

Use the **Messages** popup to send messages to team members, participants, and other users or groups in your organiziation.

Messages sent using the **Messages** popup do not appear on the event message board or the project message board. The **Messages** popup does not display messages or notifications from the event message board or the project message board.

> Note
>
> All messages exchanged using the messaging popup are stored in the SAP Ariba data center located in the United States, regardless of the data center your organization selected to host your SAP Ariba Sourcing solution.
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.

A **Messages** popup looks similar to the following:



1. Subject line
2. Recipient audience groups

> ⓘ Note
>
> The internal audience includes members of your organization. The external audience includes supplier users.

You must be a member of the **Category Buyer** group to use the **Messages** popup.

The **Messages** popup icon ( ) appears at the lower-right corner of guided sourcing event pages by default.

Messages sent using the **Messages** popup are sent to each recipient's regular email address. Messages sent to other event team members are also visible in their **Messages** popup for the event.

When you select multiple participants as recipients, the **Messages** popup sends separate messages to each participant. This ensures that participants cannot read responses from other participants.

Keep the following in mind when using the **Messages** popup:

- To open the **Messages** popup, you can use one of the following methods:
  - Click the messages icon ( )
  - Click the more icon ( ) on an item in your event interface and then select **New messages**.
  - Click the team icon ( ) and then click the messages icon ( ) following a team.
- You can move the **Messages** popup anywhere on the page.
- By default, the message subject is prefixed with the event ID, but you can change or remove it.
- If you open the **Messages** popup from the more icon ( ) for an item, the subject line is prefixed with the item title instead of the event ID. You can change or remove the subject.
- View the text of new and existing messages by clicking the message subject.
- The messages icon ( ) may not be visible based on your screen resolution and browser zoom values. If this occurs, navigate to the upper-right corner of the page, select the more options icon (•••), then select **Communication message**.

Sending Messages Using the Messages Popup

This procedure demonstrates how to use the **Messages** popup to view messages from and send messages to team members and participants.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

The **Messages** popup icon ( ) appears on the dashboard header bar and at the lower-right corner of guided sourcing event pages. You can also open the **Messages** popup from the **Team** popup or the **Items that need quotes** section.

You can use the **Messages** popup to send messages to participants and team members. Messages sent using the **Messages** popup are also sent to each recipient's regular email address.

> **Note**
>
> All messages exchanged using the messaging popup are stored in the SAP Ariba data center located in the United States, regardless of the data center your organization selected to host your SAP Ariba Sourcing solution.
>
> Each project message board, event message board, and messages popup use a unique repository and do not share messages. For example, messages in the event message board for a given event do not appear in the messages popup for the same event. Similarly, messages in the event message board for a given event do not appear in event message boards for any other event.

Procedure

1. Complete one of the following actions on the event interface:
    - Click the more icon ( ) on an item in the **Items that need quotes** section and then select **New messages**. This action allows you to quickly communicate with participants about a specific item. The default message subject is the item name.
    - Click the team icon ( ) and then click the messages icon ( ) following a team.
      After you complete this action, move to step 3. The message recipients are automatically set to the members of the team.
      If you want to add more recipients, click the team icon ( ) on the upper right cornor and then click **Add from another list**.
    - Click the messages icon ( ) and then click **Create new message** at the bottom of the **Messages** popup.
2. Select the users you want to message from the user group list and click **Next**.

   You can add multiple recipients at one time. If you want to add users from different groups, click **Add from another list**.

   If you select multiple suppliers from different organizations and send a message, your message will be sent to each supplier with internal team members separately.
3. Enter your message at the bottom of the **Messages** popup.

   By default, the message subject is prefixed with the event ID. If you need to change it, click the subject text on the top.
4. Optional: Add an attachment.
5. Click **Send** or use the **Enter** key on your keyboard.
6. **Optional:** Click the more icon ( ) in the upper-right corner of the event page and choose **View audit logs** to view log enties to track the actions performed in the **Messages** popup.

> ⓘ Note
>
> If you cannot see log entries of the actions performed in the **Messages** popup, click the Table Options Menu icon ( ) and choose **Show User Logs**.

Next Steps

After a message thread starts, you can modify recipients by clicking the team icon ( ) in the upper-right corner of the **Messages** popup. And when you finish modifying recipients, click the **Next** button to save the changes and send messages.

About Dragging and Dropping Message Attachment into a Guided Sourcing Event

You can drag-and-drop an attachment from a message popup into a guided sourcing event when you create or edit an event.

You can drag and drop attachments from message popups into line item terms, questions, and requirements. The attachments become reference documents in the event.

For the line-item terms, you can add an attachment by dragging and dropping a file from messages to the **References** section of the **Set initial value** dialog box. The file size of the attachment should not exceed 100 MB. If you or your event participants need to upload files that are larger than 100 MB, contact SAP Ariba support and your request will be evaluated and accommodated as needed.

For questions, requirements, and attachments, you can add an attachment by dragging and dropping a file from messages to the **References** column of the **Questions, requirements, and attachments** table. Alternatively, for questions, which have **Response type** set to **Attachment**, and attachments, you can add an attachment by dragging and dropping a file into the **Initial value** section of the **Add** dialog box.

You can also add an attachment item by dragging and dropping a file from the messages in between any two items in the **Questions, requirements, and attachments** table. A new attachment item is added at the end of the table and the file is added as the initial value for the attachments item.

Restrictions

- The drag-and-drop capability for adding attachments is not supported in the full-screen mode as the messenger is not available in the full-screen mode.
- Only one attachment is supported for a line-item term. If an attachment is already-present in a line-item term, you cannot add a new attachment to that term.
- The total size of the attachments for a line item term or an item in the questions, requirements, and attachments section should not exceed 100 MB. If you or your event participants need to upload files that

are larger than 100 MB, contact SAP Ariba support and your request will be evaluated and accomodated as needed.
- For security reasons, file attachments of type `.exe` are not allowed.

Related Information

Dragging and Dropping Attachments into a Guided Sourcing Event [page 569]

Dragging and Dropping Attachments into a Guided Sourcing Event

When you create a guided sourcing event, you can drag and drop files from message popups into a guided sourcing event to create file attachments.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must also 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 site must have at least one guided sourcing template (the template field **Guided Sourcing Template** is set to **Yes**) for the type of event you want to create.

Drag-and-Drop Options for File Attachments in Guided Sourcing Events

The following table describes the various options available for dragging and dropping attachments from message popup to guided sourcing events.

Content Type	UI Options	Notes
Line-item terms	Click **Set initial value** and drag and drop the file you want to add as attachment into the **References**section of the **Set initial value**.	You can add only one attachment of a maximum size of 100 MB to a line-item term. If you try to add a new attachment to a term that contains an attachment, an error occurs and the attachment fails.
Questions	• For questions that have **Response type** set to **Attachments**, drag and drop the file you want to add as attachment into the **Initial value** section of the **Add** dialog box. • Drag and drop the files that you want to attach into the **References** column of the question to which you want to add the attachment.	You can add only one attachment to the initial value. If you drag and drop another file to the **Initial value** section of a question that contains a file attachment in the initial value, you are asked to confirm whether you want to replace the existing attachment with the new one. Click **Yes** to replace; **No** to cancel. In the **References** column, you can add as many files as long as the total file size for the entry does not exceed 100 MB.
Requirements	• Drag and drop the files you want to add as attachments into the **References** section of the **Add** dialog box. • Drag and drop the files that you want to attach into the **References** column of the requirement to which you want to add the attachment.	In the **References** column, you can add multiple files as attachments. However, the size of each file should not exceed 100 MB.
Attachments	• For attachment items, drag and drop the file you want to add as attachment into the **Initial value** section of the **Add** dialog box. • Drag and drop the file that you want to attach into the **References** column of the attachment to which you want to add the attachment. • You can drag and drop the file you want to add as attachment between any two rows in the table. This creates a new attachment entry with the file added as the initial value.	You can add only one attachment to the initial value. If you drag and drop another file to the **Initial value** section of an attachment entry that contains a file attachment in the initial value, you are asked to confirm whether you want to replace the existing attachment with the new one. Click **Yes** to replace; **No** to cancel. In the **References** column, you can add as many files as you want, as long as the total file size for the entry does not exceed 100 MB.

> **Note**
>
> If you or your event participants need to upload files that are larger than 100 MB, contact SAP Ariba support and your request will be evaluated and accommodated as needed.

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.

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.

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.

Automatic Event Notification Templates [page 572]

Customizing Email Messages in a Guided Sourcing Event [page 573]

Editing Site-Wide Event Messaging Templates [page 575]

Event Notification Template Variables [page 576]

Template Variables Available in Notification Types [page 578]

Stopping Automatic Event Notifications [page 589]

Automatic Event Notification Addressing [page 590]

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.

Parent topic: About Automatic Event Notifications [page 571]

Related Information

Customizing Email Messages in a Guided Sourcing Event [page 573]
Editing Site-Wide Event Messaging Templates [page 575]
Event Notification Template Variables [page 576]
Template Variables Available in Notification Types [page 578]
Stopping Automatic Event Notifications [page 589]
Automatic Event Notification Addressing [page 590]

Customizing Email Messages in a Guided Sourcing Event

Use this procedure to modify the standard messages sent to team members and suppliers to convey the required information at different stages of a guided sourcing event.

Prerequisites

To be able to add or modify translations in an email template, you must be a member of the **Translator** group.

Context

Buyers may want to customize a standard email notification in circumstances such as:

- The content in the standard email message doesn't convey the required information or additional information is required.
- Individual notifications (a specific team member or supplier) and group notifications (all other participants) are required.
- Translations are required for the message content.

Procedure

1. Open the guided sourcing project for editing.
2. Click ••• *(More actions)* and select **Event settings** > **Customize messages**.

   A page appears where all the standard email templates are shown listed in a table. Custom email templates, if present in the project template, are also included in the list. The columns of the table are described as follows:

Column Name	Description
Apply template to	Indicates whether the template is applicable for all the participants or to a specific team member or supplier.
Message template name	Name of the email template.
Subject	Subject of the email.
Content	Email message body.
State	Indicates whether the email template is enabled or disabled.
Customized	Indicates whether the email template has been customized.
Edit	Option to edit the email template.

> ⓘ Note
>
> - The email templates are automatically sorted by the template name. For localized users, the email templates are sorted by the localized template name. Manual sorting is not permitted.
> - If you want to customize emails specific to awarding an event during the award phase, click the **Award** button, select a supplier, and then select the **Customize award emails** option. In that case, the resultant page shows the email templates applicable only to the awarding phase of the event.

3. To customize an email template:
    a. Select the corresponding ✎ *(Edit)* button.

    > ⓘ Note
    >
    > You can use the search bar at the table header to find the template you want to edit.

    b. On the **Customize message template** page, select a value from the **Apply template to** dropdown.

    Email templates are applicable to all participants by default. If you want the template to be applicable to a specific team member or supplier, you can select them from the dropdown provided they're added to the event.

    c. Modify the subject and the message body of the template as necessary.

    You can choose to add tokens to the subject and the message body of the template by selecting the respective **Add token** option. Tokens added to the subject or the message body are automatically placed at the end of existing content. You can replace it at the desired position with a simple cut/paste operation.

    You can also add translations to the subject and the message body by selecting the respective **Translations** option.

    > ⓘ Note
    >
    > Adding translations requires permissions as described in the **Prerequisites** section of this topic.
    >
    > Translations, if already present for the subject or message body content, are prepopulated in the placeholder of the respective language.

    d. Save your changes.
4. To disable an email template, select the checkbox against the template and click **Enable/Disable**.

    You can select multiple email templates at a time and disable them together.

    You can perform the same action to re-enable an email template that is disabled. You can select multiple email templates (which are disabled) at a time and enable them together.

    > ⓘ Note
    >
    > - If you select an email template that's enabled (let's suppose Template A) and an email template that's disabled (let's suppose Template B), and click **Enable/Disable**, Template A will be disabled and Template B will be enabled and vice versa.
    > - When you disable a custom email template, the standard version of the email template is reinstated and used for notifications.

5. To delete a customized email template, select the checkbox against the template and click **Delete**.

You can use this option to revert the customizations made to a standard email template. When you delete a custom email template, the standard version of the template is reinstated and used for notifications.

You can select multiple email templates at a time and delete them together.

> ⓘ Note
>
> Standard email templates cannot be deleted. If you select multiple email templates that also include standard email templates and click **Delete**, the operation is interrupted and the standard messages are highlighted on the page for deselection.

6. Click **Done**.

Results

The email customizations are in effect.

Task overview: About Automatic Event Notifications [page 571]

Related Information

Automatic Event Notification Templates [page 572]
Editing Site-Wide Event Messaging Templates [page 575]
Event Notification Template Variables [page 576]
Template Variables Available in Notification Types [page 578]
Stopping Automatic Event Notifications [page 589]
Automatic Event Notification Addressing [page 590]

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**.

Task overview: About Automatic Event Notifications [page 571]

Related Information

Automatic Event Notification Templates [page 572]
Customizing Email Messages in a Guided Sourcing Event [page 573]
Event Notification Template Variables [page 576]
Template Variables Available in Notification Types [page 578]
Stopping Automatic Event Notifications [page 589]
Automatic Event Notification Addressing [page 590]

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.

Variable	Description
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.
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.

Variable	Description
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.

Parent topic: About Automatic Event Notifications [page 571]

Related Information

Automatic Event Notification Templates [page 572]
Customizing Email Messages in a Guided Sourcing Event [page 573]
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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)

Notification Type	Variable
	Sponsor Phone (SPONSOR_PHONE)
	Site Url (SITE_URL)
	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)

Notification Type	Variable
	Project Id (PROJECT_ID)
Envelope opened	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)
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)

Notification Type	Variable
	Event Title (EVENT_TITLE)
	Project Id (PROJECT_ID)
	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)

Notification Type	Variable
	Sponsor Corporate Name (SPONSOR_CORPORATE_NAME)
	Sponsor Email (SPONSOR_EMAIL)
	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)

Notification Type	Variable
Event start time reminder	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)
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)

Notification Type	Variable
	Time (TIME)
	Password Url (PASSWORD_URL)
	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)

Notification Type	Variable
	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 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)

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)
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)

Notification Type	Variable
	Sponsor Email (SPONSOR_EMAIL)
	Sponsor Phone (SPONSOR_PHONE)
	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)

Notification Type	Variable
Uninvite a participant	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)
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)

Parent topic: About Automatic Event Notifications [page 571]

Related Information

Automatic Event Notification Templates [page 572]
Customizing Email Messages in a Guided Sourcing Event [page 573]

[Editing Site-Wide Event Messaging Templates [page 575]]
[Event Notification Template Variables [page 576]]
[Stopping Automatic Event Notifications [page 589]]
[Automatic Event Notification Addressing [page 590]]

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.

Task overview: [About Automatic Event Notifications [page 571]]

Related Information

Automatic Event Notification Templates [page 572]
Customizing Email Messages in a Guided Sourcing Event [page 573]
Editing Site-Wide Event Messaging Templates [page 575]
Event Notification Template Variables [page 576]
Template Variables Available in Notification Types [page 578]
Automatic Event Notification Addressing [page 590]

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	
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	

Trigger Action and Description	Notification Text	Instant Message	Email
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

Parent topic: About Automatic Event Notifications [page 571]

Related Information

Automatic Event Notification Templates [page 572]
Customizing Email Messages in a Guided Sourcing Event [page 573]
Editing Site-Wide Event Messaging Templates [page 575]
Event Notification Template Variables [page 576]
Template Variables Available in Notification Types [page 578]
Stopping Automatic Event Notifications [page 589]

Guided Sourcing Event Reports

You can use guided sourcing event reports to analyze bids and scenarios and to retain information about events.

You can download the following reports to view desired information about an event in guided sourcing:

Report	Content	Format
Bid summary [page 594]	Summary information of bids. Only the most recent bid for each participant is shown (no bid history is included). It also includes initial, historic, and reserve values and indicates which suppliers are incumbent.	Excel
Bid history [page 595]	Records for all bids submitted by participants, with the date and time.	Excel
Configurable bid comparison [page 596]	Comparison among values of terms and rolled-up terms, formulas, item rank, percentage differences from the lead bid, and supplier responses to your questions. You can filter the report data by participants, items, and terms.	Excel
Full bid data [page 600]	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.	Excel
Supplier response [page 602]	Supplier responses to the event and a summary of the event and its content. You can select the participants and items to include in the report.	PDF
Scenario report [page 603]	Award scenarios that can be analyzed using Excel functions.	Excel
Suppliers Invitation report [page 605]	Export a list of invited suppliers (participants) from an event. You can select all or any columns from the supplier information to be included in your report.	Excel
Event summary [page 607]	Summary of the event header fields, rules, content, and current item values, but does not include bid details. (Not suitable for comparing or analyzing bids.)	PDF
Items Rank report [page 608]	Rank of each participant selected for the report. You can view the leading (best bid) participant and leading incumbent participant for each item.	Excel

ⓘ Note

- For events with more than 100 suppliers, the following reports are downloaded in XLSX format:
  - Bid History Report
  - Bid summary report
  - Questions and Terms Report
  - Bid Comparison Report
- When events are in the Review Responses stage and the **SRC-1401-5: SRC-1401-5 - Allow event owner to download the comments entered by graders during team grading** feature is enabled, the **Download report** menu offers an additional option, **Grader comments report**. This option lets the project owner download a report containing the graders' comments.

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]

Creating Excel Event Bid History Reports in Guided Sourcing [page 595]

Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]

Creating Excel Bid Summary Reports in Guided Sourcing

Use this procedure to create Excel bid summary reports. 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

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

> ⓘ Note
>
> You can download a bid summary report only after suppliers submit their bids to the event.

Procedure

1. In the upper-right corner of the event page, click the more actions icon (···).
2. Click **Download report**.
3. Select **Bid summary report**.

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).

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

Creating Excel Event Bid History Reports in Guided Sourcing [page 595]
Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]
Creating Excel Full Bid Data Reports in Guided Sourcing [page 600]
Creating PDF Supplier Response Reports in Guided Sourcing [page 602]
Creating Excel Scenario Reports in Guided Sourcing [page 603]
Creating Excel Supplier Invitation Reports [page 605]
Creating PDF Event Summary Reports in Guided Sourcing [page 607]
Creating Items Rank Report in Guided Sourcing [page 608]

Creating Excel Event Bid History Reports in Guided Sourcing

Use this procedure to create Excel event bid history reports, which are useful for seeing how suppliers' bids have progressed during an event. You can also use Excel functions to analyze bids.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

You can view participant bids by generating an Excel bid history report. You can generate a bid history report at any time. For example, you can generate a bid history 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.

For more information, see Exporting event bid history to Excel.

Procedure

1. In the **Items that need quotes** panel on the **Monitor event** page, click the download icon (⤓).
2. Click **Bid History Report**.
   SAP Ariba generates the bid history report Excel file.
3. Open or save the file to your computer.

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]
Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]
Creating Excel Full Bid Data Reports in Guided Sourcing [page 600]
Creating PDF Supplier Response Reports in Guided Sourcing [page 602]
Creating Excel Scenario Reports in Guided Sourcing [page 603]
Creating Excel Supplier Invitation Reports [page 605]
Creating PDF Event Summary Reports in Guided Sourcing [page 607]
Creating Items Rank Report in Guided Sourcing [page 608]

Creating Configurable Excel Bid Comparison Reports in Guided Sourcing

Use this procedure to configure an Excel bid comparison report to show the values of terms and rolled-up terms, formulas, item rank, percentage differences from the lead bid, and supplier responses to your questions.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

For product questionnaire functionality, Category Attribute Hierarchy must be enabled in your site.

Context

You can run a bid comparison report when at least one participant response is available for a guided sourcing event. You can configure the report to include only the information that is useful to you when you are deciding which suppliers should receive an award. You can save report configurations for use in the future. After reviewing the report, you may even decide that it isn't prudent to award business at this point. You 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 the questions you've asked.

Restrictions:

- 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 are not supported.

Procedure

1. In the **Items that need quotes** panel on the **Monitor event** page, click the download icon (⤓).
2. Click **Bid Comparison Report**.
   You see two tabs: **Items and Participants** and **Report Configuration**.
3. On the **Items and Participants** tab, choose items, lots, and participants for the report. For participants, you can choose all, incumbents, non-excluded participants, 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.
4. 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 use the **Row** and **Column** radio buttons to choose the axis on which you want to have terms aligned on the report spreadsheet. **Column** is selected by default. Note that the roll up functionality is not available when you choose to display terms in rows.
5. Under **Roll up**, choose the terms (for example, **Savings** and **Extended Price**) to roll up in section and event totals.

6. Under **Highlight**, you can choose to highlight lead bid price, lead bid total, excluded participant, and missing price in 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.

   If 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.

   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.
7. Under **Sorting participants**, you can choose to sort them by name, event-level total (best total bid on all items a participant bid on), excluded to non-excluded, 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.
8. Under **Report summary**, 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.

   You can select **Include summary section** 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**.
9. Under **Additional configuration**, you can 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.

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.

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 you select the **Create header information sheet** check box, 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.

When the **Include product questionnaires** check box is selected, 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.

Number	Name	Initial Values	Supplier Company 1	Supplier Company 2	Supplier Company 3	Supplier Company 3
1	Line Item - L1					
	Custom Term 1					
	Attachment Query 2	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx	Initial Doc.docx
	Date Query 1	10/29/2020 6:30 PM	10/29/2020	10/27/2020	10/28/2020	10/29/2020
	Attachment Query 1	file-sample_1MB.docx	doc_ref_784.xls	sample_ref_23456.docx	refDoc2.xls	doc_ref_99912.xls

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.

10. Click **Export**. The **Save Configuration** popup appears, allowing you to save the report configuration with a name. Open the report when it becomes available.

 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.

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]
Creating Excel Event Bid History Reports in Guided Sourcing [page 595]
Creating Excel Full Bid Data Reports in Guided Sourcing [page 600]
Creating PDF Supplier Response Reports in Guided Sourcing [page 602]
Creating Excel Scenario Reports in Guided Sourcing [page 603]
Creating Excel Supplier Invitation Reports [page 605]
Creating PDF Event Summary Reports in Guided Sourcing [page 607]
Creating Items Rank Report in Guided Sourcing [page 608]

Creating Excel Full Bid Data Reports in Guided Sourcing

Use this procedure to create Excel full bid data reports. 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.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

> ⓘ Note
>
> - You can download a full bid data report only after suppliers submit their bids to the event.
> - You cannot create a full bid data report for guided sourcing events that have more than 100 bids.

Procedure

1. In the upper-right corner of the event page, click the more actions icon (···).
2. Click **Download report**.
3. Select **Full bid data report**.

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.

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Related Information

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]
Creating Excel Event Bid History Reports in Guided Sourcing [page 595]
Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]
Creating PDF Supplier Response Reports in Guided Sourcing [page 602]
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Creating PDF Supplier Response Reports in Guided Sourcing

Use this procedure to create PDF supplier response reports with information for specific suppliers.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

> ⚠ Restriction
>
> If the **Estimated file size** exceeds the *Maximum file size allowed*, the **Export** button in the **Supplier response report** box is disabled, and a warning message is displayed.

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.

Procedure

1. In the upper-right corner of the event page, click the more actions icon (···).
2. Click **Download report**.
3. Select **Supplier response report**.

   The **Supplier response report** box appears, where you can choose the participants you want to include in the supplier response report.

   The box displays event participants who have submitted bids and who are in the following statuses:

   - **Participated**
   - **Reconciled Lot Details**
   - **Submitted Prerequisites**
   - **Submitted Prebid**
   - **Submitted Prebid with Alternative**
   - **Participated with Alternative**

   You can also view the exclusion status of suppliers on the user interface. The PDF, however, does not include the exclusion status.

4. Choose the participants you want to include in the report.
5. Choose **Include Product Questionnaire** to add product questionnaire responses to the report.

   A table is displayed with all the available product questionnaires. The table also displays the number of questions in the questionnaire and the number of participants (out of the selected participants) who responded.
6. Choose the product questionnaires that you want to add to the report.

   > ⓘ Note
   >
   > If you select the **Include Product Questionnaires** checkbox, you must select at least one product questionnaire from the table.
7. Click **Export**.

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

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Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]
Creating Excel Full Bid Data Reports in Guided Sourcing [page 600]
Creating Excel Scenario Reports in Guided Sourcing [page 603]
Creating Excel Supplier Invitation Reports [page 605]
Creating PDF Event Summary Reports in Guided Sourcing [page 607]
Creating Items Rank Report in Guided Sourcing [page 608]
Enlarge page size of supplier response report PDF files

Creating Excel Scenario Reports in Guided Sourcing

Use this procedure to create Excel scenario reports. Excel scenario reports enable you to use Excel functions to compare award scenarios.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

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. In the upper-right corner of the event page, click the more actions icon (⋯).
2. Click **Download report**.
3. Select **Scenarios report**.

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).

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]
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Creating PDF Event Summary Reports in Guided Sourcing [page 607]
Creating Items Rank Report in Guided Sourcing [page 608]

Creating Excel Supplier Invitation Reports

Use this procedure to create Excel supplier invitation reports. This feature allows you to export a list of invited suppliers to Excel. This report can be useful to buyers who would like to review and analyze supplier information offline.

Prerequisites

- This feature is supported only in the guided sourcing user interface. The SAP Ariba Sourcing classic user interface also allows users to export supplier (participant) information. For more information about using Excel worksheets to obtain supplier information, see About the Excel Worksheets Used to Import Data into Events.
- To use this feature in the **For You** dashboard, your site must have guided sourcing enabled.
- You must be a member of the **Category Buyer** group and have read access for the event.
- You must be an event owner or have project owner capabilities for the event.

Context

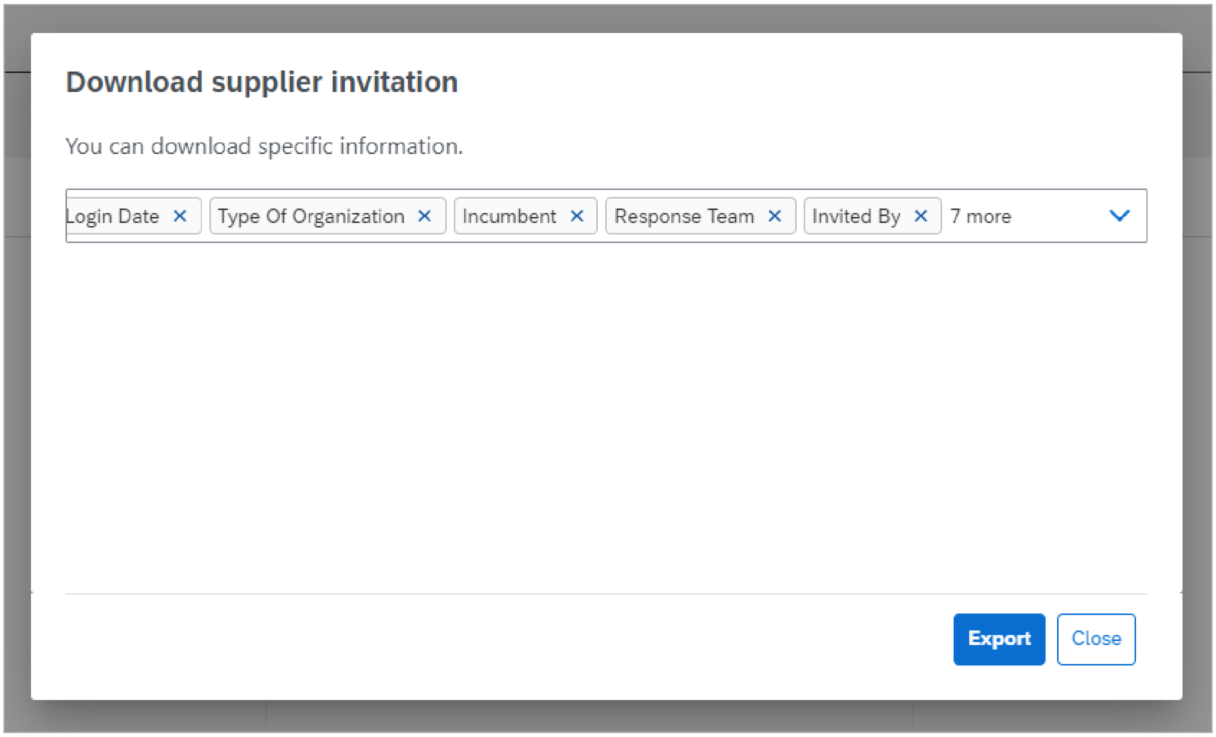
If a buyer wishes to review a list of invited suppliers based on their contact information and status, they can download the supplier information and select columns such as the contact name, business email address, organization name, and last sign in date. After the buyer selects the columns they wish to analyze, they can export the report as a read-only Excel file. The report includes these columns:

- **Organization Name**
- **Contact Name**
- **Business Email Address**
- **Alias**
- **Phone Number**
- **User Name**
- **Address**
- **Last Sign in Date**
- **Type of Organization**
- **Incumbent**
- **Response Team**
- **Invited by**

The report is available for opened events in the following phases: **Create**, **Monitor**, **Review responses**, and **Award**.

Procedure

1. Open a guided sourcing event in any of the following phases: **Create**, **Monitor**, **Review responses**, or **Award**.
2. Navigate to the upper-right corner of the opened event page and click more actions icon (⋯).
3. Select **Download supplier invitation**. A pop-up window opens.
4. In the **Download supplier invitation** pop-up window, select any or all the columns of the supplier information you wish to download.



5. After selecting the columns you wish to analyze, click **Export**.

Results

SAP Ariba Sourcing creates a read-only Excel file for you to analyze and review offline. This file cannot be modified or re-imported.

Task overview: Guided Sourcing Event Reports [page 593]

Related Information

Creating Excel Bid Summary Reports in Guided Sourcing [page 594]
Creating Excel Event Bid History Reports in Guided Sourcing [page 595]
Creating Configurable Excel Bid Comparison Reports in Guided Sourcing [page 596]

Creating PDF Event Summary Reports in Guided Sourcing

Use this procedure to create PDF event summary reports.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

Context

The event summary report displays a summary of the event and its detailed content in PDF format. You can export event summary reports for a specific supplier and item.

Procedure

1. In the upper-right corner of the event page, click the more actions icon (···).
2. Click **Download report**.
3. Select **Event summary report**.
   The **Download Event Summary Report** dialog box opens.
4. Select an item, a supplier, and a term.
5. Click **Ok**.
   The event summary report is downloaded.
6. Open or save the file to your computer.

   > ⓘ Note
   >
   > The grading and scoring information and the calculations are different, depending on whether the event was created in classic sourcing or guided sourcing. If the event is created in guided sourcing, then the event summary report displays the grades as per the calculation done in guided sourcing, even if you later open the report in classic sourcing.

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Related Information

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Creating Excel Event Bid History Reports in Guided Sourcing [page 595]
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Creating Items Rank Report in Guided Sourcing

Use this procedure to create an items rank report. The report is generated as an Excel file and displays the rank of bids for each participant you select for the report.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

> ⓘ Note
>
> Items rank report is not available for large capacity events because large capacity events are not supported in guided sourcing.

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.

Procedure

1. Open a guided sourcing event in any of the following phases: Open, Pending Selection, Completed.
2. Navigate to the upper-right corner of the opened event page and click more actions icon (•••).
3. Select **Download report** > **Items rank report**.

   The **Items rank report** popup appears. It displays the list of participants who have submitted their bid.
4. Select the participants for the report and click **Export**.

Results

SAP Ariba creates an Excel file with the report.

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 4 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`*, 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 4, 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.

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Viewing Audit Logs in Guided Sourcing Events

Guided sourcing logs user and system actions performed on guided sourcing events. Use this procedure to view the audit logs to verify that users participate, to see when participants enter and exit the event, to see when they downloaded attachments, or to resolve disputes.

Prerequisites

Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

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

Context

Audit log entries are shown in a list, which contains the following columns:

- **Date created**: The time when the action occurred.
- **Real user**: The name of the user who performed the action.
- **On behalf of**: Typically the same as the real user. When a buyer surrogate bids for a supplier, the user name of the supplier.
- **Action**: The name of the action, such as "Event edited and republished", "Bidding ends; event moves to 'Pending Selection' state".
- **Scope**
- **Details**: Sometimes includes additional details. For example, if there is award optimization, the **Details** column states what kind of award optimization scenario the buyer submitted (for example, best bid, best bid with limited number of suppliers).
- **Node**: Node where the event is executed. This column is hidden by default.

Procedure

1. In the upper-right corner of the event page, click the more actions icon (···) and select **View options** > **View audit logs**.

   The **Event Audit Log** page opens, showing a list of audit logs.
2. Find log entries you want to view by using one or both of the following methods:
   - In the search field, search for the entries by keyword.
   - Select **Show filters** and apply one or more of the following filters:
     - **Date range**

- **User**
- **Action**
- **Scope**
- **Details**
- **Node**
- **Log type**
  Apply this filter to switch between system and user log entries.

> Note
>
> If the filter section is not displayed, click **Show filters**.

3. **Optional:** Perform the following operations as necessary:
   - Select the gear icon ( ) to open a selector for choosing the columns you want to show or hide.
   - To view the profile of a user, click the hyperlinked user name in the list.
   - To view bid response details, click the hyperlinked text **View response details** in the **Details** column.

     > Note
     >
     > If a bid submission or bid award is logged, there is a **View response details** hyperlink in the **Details** column, which takes you to the **Response details** page. You can view response details, such as who submitted the bid, the submission time, items in the bid, and item prices.

   - To export audit log entries, click the **Excel export** icon ( ) on the upper-right corner of the list. Then, select **Export all rows** to export all rows and columns, or select **Export current page** to export only visible rows and columns (for example, if you search by keyword or apply filters, the rows filtered out are not exported; if you hide certain columns, these columns are not exported).
4. Click **Close** to return to the event.

Grading and Scoring in Guided Sourcing Events

The optional grading and scoring feature enables you to create an objective comparison model to help you choose between suppliers.

With the grading and scoring feature, you assign **Weight** points to the parts of your event content according to their importance, then grade supplier responses to produce an overall score for each supplier.

You can use the optional grading and scoring feature to:

- Analyze an event that contains a large amount of content or receives many supplier responses.
- Make objective decisions when awarding suppliers.
- Define and numerically rank the factors in your purchasing decision.
- Calculate the Most Economically Advantageous Tender (MEAT) offer.

The grading and scoring feature also supports the following capabilities in guided sourcing events:

- Team grading [page 617], which enables multiple team members to grade supplier responses for an event. The individual grades are used to calculate a consensus grade. Team members can grade suppliers' alternative bids, and you can review and adjust the consensus grade.
  In guided sourcing events with team grading, you can also:
  - Assign weights to graders to increase or decrease the value of the scores the graders specify.
    For example, you might want to give an experienced grader a higher weight than a junior grader. For more information, see Assigning Weights to Graders [page 619].
  - Use grading groups to control which user groups can score content sections or items. For more information, see Using Grading Groups To Restrict Grading for Sections and Items [page 620].
- Automatic grading [page 626] (auto-grading or pre-grading), which enables you to define rules before publishing an event to automatically grade supplier responses.
- Scorecards [page 633], which enable you to view and export all event content and grading details in a guided sourcing event.
- Blind grading, which enables you to specify if external graders can see the participant identity or profile during the grading process to increase the level of objectivity and remove bias.

In guided sourcing events, you can also define terms using the Current Minimum Value (CurrentMinValue) and Current Maximum Value (CurrentMaxValue) formula functions. These functions return the minimum or maximum value of all submitted values for a term, which can be useful when comparing responses for scoring.

> ⓘ Note
>
> SAP strives to continuously improve SAP Ariba Sourcing features and functionalities, including automation, transaction processing, and machine learning. SAP may use customer data to test these improvements.
>
> SAP is testing an intelligent supplier service for the guided sourcing grading and scoring feature to provide automated supplier grading scores in award scenarios.
>
> The proposed intelligent supplier service is solely specific to SAP Ariba guided sourcing.
>
> Data used to test the intelligent supplier service includes purchase order details (dates, commodity, count, amount, part names, and order type), supplier information (name, location, ID, and historic performance), and customer actions taken in award scenarios (reject, need by date, order dates). Sole Proprietor data may be

included in data processing, with traceability to individual persons via person names which may be included in sole proprietor business name(s).

Event Rules for Grading and Scoring

- The event rule Enable scoring on participant responses must be set to **Yes** to use scoring in an event.
- The event rule Allow participants to see scoring weights determines if participants can see score weights.
- The event rule **Enable blind grading on participant responses** hides participant information from external graders.

About Weights in Guided Sourcing Events [page 614]

Grading Supplier Responses in Guided Sourcing Events [page 616]

Team Grading in Guided Sourcing Events [page 617]

Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]

Viewing Scorecards and Generating Reports in Guided Sourcing [page 633]

About Weights in Guided Sourcing Events

In guided sourcing events, you use **Weight** points to rate the importance of each piece of content. The more **Weight** points you assign each piece of content, the more that content contributes toward the final score. You need to assign **Weight** points before publishing an event.

On the event **Create** page, you can use the **Set weight** button in the **Items that need quotes** or the **Questions, requirements, and attachments** panel to open the **Set grading weight** page and assign **Weight** points.

> Note
>
> The **Set weight** button is available only when both the following conditions are met:
>
> - The **Enable scoring on participant responses** event rule is enabled for the event.
> - You have entered event content for the event.

For each hierarchical content, **Overall weight** shows how that content contributes toward the final score based on the following formula:

hierarchy weight * parent level total weight = hierarchy overall weight

The following table demonstrates how the hierarchy weight and the parent-level total weight values are used to calculate the hierarchy overall weight for each content item:

Number	Name	Weight	Overall Weight
1	Section 1	70%	70%
1.1	Question 1	60%	60% * 70% = 42%

Number	Name	Weight	Overall Weight
1.2	Question 2	40%	40% * 70% = 28%
2	Section 2	30%	30%
	Total weight of Section 1	70%	

In the preceding example, the hierarchy weight of Question 1 is 60% and the parent-level total weight of Section 1 is 70%. Hence, the hierarchy overall weight of Question 1 is 42%.

The **Subtotal weight** and **Total weight** values should not exceed 100%. If the values exceed 100%, the system does not allow you to save the weight points. The following table demonstrates an example where the **Subtotal weight** exceeds 100%.

Number	Name	Weight	Overall Weight
1	Section 1	70%	70%
1.1	Question 1	49%	49% * 70% = 34.3%
1.2	Question 2	86%	86% * 70% = 60.2%
2	Section 2	30	30%
	Total weight of Section 1	70%	

In the preceding example, the hierarchy weights for Question 1 and Question 2 are 49% and 86% respectively. Hence, the **Subtotal weight** of Section 1 is 135%.

If you have enabled the **Prevent awarding items that don't meet the grading threshold** event rule, the **Set grading weight** table contains an additional column: **Target grade**. A target grade is the grading threshold that sections and items must meet. If an item doesn't meet its grading threshold, it can't be awarded.

After publishing an event, you can use the **Display** > **Scoring** option in the **Items that need quotes**, the **Allocate awards**, or the **Questions, requirements, and attachments** panel on the event page to open the **Scoring** page and view the **Weight** points assigned to each piece of content.

You can also set weights for team graders. For example, you can give an experienced grader a higher weight than a junior grader. For more information, see Assigning Weights to Graders [page 619].

Parent topic: Grading and Scoring in Guided Sourcing Events [page 613]

Related Information

Grading Supplier Responses in Guided Sourcing Events [page 616]
Team Grading in Guided Sourcing Events [page 617]
Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]
Viewing Scorecards and Generating Reports in Guided Sourcing [page 633]

Grading Supplier Responses in Guided Sourcing Events

Use this procedure to grade supplier responses when an event moves to the **Review responses** state.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You must use an RFP or RFI event with:
  - The **Enable scoring on participant responses** event rule enabled
  - A **Review for team grading** task that is not started or with a **Review for team grading** task that is in progress but all supplier responses to grade are auto-graded

Context

A guided sourcing event moves to the **Review responses** state when an event administrator clicks the **Stop event** button or at the end of the scheduled event time. If you are a team grader (a user assigned as a reviewer for the **Review for team grading** task), you grade the responses suppliers submitted. Assign a grade from 0% to 100% depending on how well each response meets your needs.

If automatic grading is set up, you can also view and adjust grades calculated by the system on the **Adjust grades** page.

> Note
>
> - If an event has a **Review for team grading** task that is in progress, and supplier responses to grade are not automatically graded, the **Adjust grades** page is unavailable and you can adjust grades on the **Consensus grading** page.
> - If alternative bidding is enabled for an event, suppliers can submit alternative bids after the primary bid. However, the offline grade sheet contains only the primary bid data. Hence, graders cannot submit grades for alternative supplier bids from the offline grade sheet.

Procedure

1. Open the event in which you want to assign grades or adjust automatic grades.
2. Click the more actions icon (···) in the upper-right corner of the event page and choose **Event scoring options** > **Adjust grades**.

   The **Adjust grades** page opens.

3. Choose one of the following methods to view supplier responses:
    - Click **Expand all** in the lower-left corner of the grading page to view supplier responses to all event content.
    - The table can show the responses from up to 20 participants, as specified by the Maximum suppliers for grading table on the guided sourcing grading page (`Application.AQS.MaxDisplaySuppliersGSInGradingTable`) parameter. An administrator for your site can change the value of this parameter using the Intelligent Configuration Manager; the maximum value is 40 (show the responses from up to 40 participants).
    - Select a specific item or question in the **Select item or question** dropdown list to view supplier responses to a specific event content. You can go through all items and questions by clicking the **Next** and the **Previous** buttons.
4. **Optional:** Click the calculator icon ( ) next to system-calculated grades to view the formula used to calculate automatic grades.
5. Assign grades or adjust automatic grades that you are not satisfied with.

    > Note
    >
    > The grade value must be a number between 0 and 100, with 100 being the best possible grade.

6. Click the **Submit** button.

Task overview: Grading and Scoring in Guided Sourcing Events [page 613]

Related Information

About Weights in Guided Sourcing Events [page 614]
Team Grading in Guided Sourcing Events [page 617]
Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]
Viewing Scorecards and Generating Reports in Guided Sourcing [page 633]

Team Grading in Guided Sourcing Events

With team grading, multiple project team members can grade supplier responses to event content. The system uses the grades to generate a single **consensus grade**.

Team members can have differing opinions about what information is important as well as the quality of the responses of a supplier. Team grading enables you to solicit grades for supplier responses from multiple project team members (team graders).

To use team grading for a guided sourcing event, the event must be created from a template with a **Review for team grading** task, as described in How to configure event templates for guided sourcing in the Setting Up Guided Sourcing guide.

Users who are assigned as reviewers for the **Review for team grading** task in an event become team graders. Team graders use the **Review for team grading** to submit grades for grade supplier responses.

Event administrators can review or adjust consensus grades of team members on the **Consensus grading** page.

In guided sourcing events with team grading, you can also:

- Assign weights to graders to increase or decrease the value of the scores the graders specify. For example, you might want to give an experienced grader a higher weight than a junior grader, or if you use blind grading, those graders might receive a higher weight than other external or team graders in the final score. For more information, see Assigning Weights to Graders [page 619].
- Use grading groups to control which user groups can score content sections or items. For more information, see Using Grading Groups To Restrict Grading for Sections and Items [page 620].

Team Grading Notifications

If you are one of the reviewers of the **Review for team grading** task, you receive notification emails indicating that you need to complete the task.

If you are the event owner, you receive an email notification when all reviewers have completed the **Review for team grading** task and you can review or adjust consensus grades on the **Consensus grading** page.

Assigning Weights to Graders [page 619]

Using Grading Groups To Restrict Grading for Sections and Items [page 620]

Initiating Team Grading in Guided Sourcing [page 621]

Grading Supplier Responses as a Team Grader in Guided Sourcing [page 623]

Adjusting Consensus Grades in Guided Sourcing [page 624]

Parent topic: Grading and Scoring in Guided Sourcing Events [page 613]

Related Information

About Weights in Guided Sourcing Events [page 614]
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Assigning Weights to Graders

Assigning weights to graders increases or decreases the value of the scores the graders specify.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event rule **Enable scoring on participant responses** is enabled.

Context

You can assign a weight to a grader in an event to increases or decrease the value of the scores the grader specifies.

The default weight of each grader is 100. A weight lower than 100 will reduce the grader's impact, a weight higher than 100 will increase the grader's impact. For example, a weight of 200 doubles the impact of the grader's score in the final scoring result.

The final grade is calculated as a weighted average:

```
        (w1*g1 + w2*g2 + ... + wn*gn) / (w1+w2+ ... +wn),
```

Where `w1`, `w2`, etc. and `g1`, `g2`, etc. are the assigned weights and the grader's grades, respectively.

For example:

Grader A: Weight 100%, provides a grade of 50% to a question.

Grader B: Weight 50%, provides a grade of 70% to the same question.

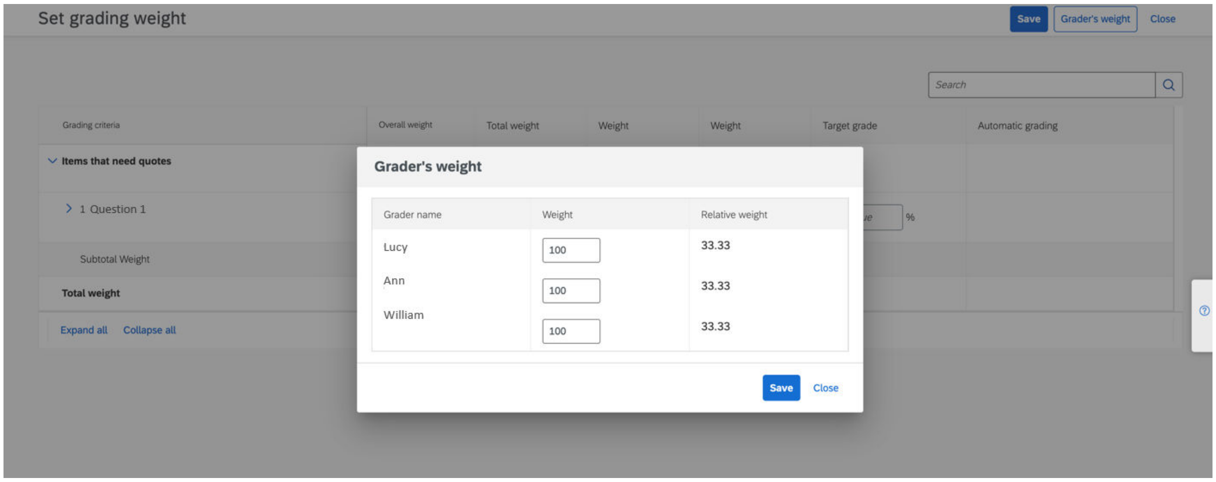
The total grade for the question is 56.66% `[(100*50 + 70*50)/(100+50)]`

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event** .
2. In the **Items that need quotes** or the **Questions, requirements, and attachments** panel, select the **Set weight** button to open the **Set grading weight** page.

   The **Set weight** button is visible only in panels with content.
3. Select the **Grader's weight** button.

   The the **Grader's Weight** popup opens with a table of users who are added as team graders or external graders for the event. Assign the **Weight** points for each grader.



Task overview: Team Grading in Guided Sourcing Events [page 617]

Related Information

Using Grading Groups To Restrict Grading for Sections and Items [page 620]
Initiating Team Grading in Guided Sourcing [page 621]
Grading Supplier Responses as a Team Grader in Guided Sourcing [page 623]
Adjusting Consensus Grades in Guided Sourcing [page 624]

Using Grading Groups To Restrict Grading for Sections and Items

Use grading groups when you want to allow subsets of team graders to score specific content sections or items.

By default, team grading privileges are assigned at the event level. This means that all users with the grading privilege can grade all sections and items in guided sourcing events.

To restrict the grading privilege for sections and items to specific user groups, you can specify **Grading Groups** for sections or items when you add or edit sections or items in guided sourcing events.

> ⓘ Note
>
> - The **Grading Groups** field is available for sections and items only when the ICM parameter **Assign team grading privilege for sections and items** (`Application.ACM.AssignTeamGradingPrivilegeForSectionsAndItems`) is set to **Yes**. For information about how to manage ICM parameters, see Intelligent Configuration Manager Administration.
> - The users included in the **Grading Groups** specified for sections or items must be team graders specified for the **Review for Team Grading** task or users who can manage the sourcing events, for example, the project owners and event administrators.
> - You cannot assign grading privileges for individual item terms.

When the **Review for Team Grading** task starts and a user attempts to grade an item, guided sourcing checks the following to see whether the user has appropriate privileges to grade this item:

1. Is the user a team grader, the project owner, or the event administrator?
   - If they are, they have grading privileges for the event. Guided sourcing proceeds to the next check.
   - If they are not, they don't have grading privileges for any content in the event.
2. Does the item have **Grading Groups** specified?
   - If the item has **Grading Groups** specified, guided sourcing then checks whether the user is in the **Grading Groups** for the item. If the user is in the **Grading Groups**, they can grade the item. If not, they can't grade the item.
   - If the item does not have **Grading Groups** specified, guided sourcing proceeds to the next check.
3. Does the section that this item belongs to have **Grading Groups** specified?
   - If the section has **Grading Groups** specified, guided sourcing then checks whether the user is in the **Grading Groups** for the section. If the user is in the **Grading Groups**, they can grade the item. If not, they can't grade the item.
   - If the section does not have **Grading Groups** specified, that is, both the item and the section that contains the item don't have **Grading Groups** specified and the user is a team grader, the user can grade the item and section.

Parent topic: Team Grading in Guided Sourcing Events [page 617]

Related Information

Assigning Weights to Graders [page 619]
Initiating Team Grading in Guided Sourcing [page 621]
Grading Supplier Responses as a Team Grader in Guided Sourcing [page 623]
Adjusting Consensus Grades in Guided Sourcing [page 624]
Assign team grading privileges for sections and items

Initiating Team Grading in Guided Sourcing

This procedure describes how to use the **Review for team grading** task to assign team graders to review and submit their grades for supplier responses. You can also review the approval flow of a grading task to check the team grading progress in the task page after initiating the task.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.

- You must use an RFP or RFI event with:
  - The **Enable scoring on participant responses** event rule enabled
  - A **Review for team grading** task that is not started. A **Review for team grading** task must be configured in the event template, as described in Configuring Event Templates for Guided Sourcing in the Setting Up Guided Sourcing guide.

Context

A **Review for team grading** task is initiated automatically when an event changes to the **Review responses** state if the task has reviewers and has no predecessor phases or tasks.

You must assign at least one reviewer to the **Review for team grading** task to initiate the task.

Procedure

1. Open the event in which you want to initiate the **Review for team grading** task.
2. Click the more actions icon (···) in the upper-right corner of the event page and choose **View team grading task**.

   The task page opens.
3. Click the **Add a step** button in the **Approval flow** field.
4. Open the drop-down list of **Approver type**:
   - Choose the **A user** option when you want one individual user to grade supplier responses.
   - Choose the **Anyone on the team** option when you want one member on a team to grade supplier responses.
   - Choose the **Everyone on the team** option when you want everyone on a team to grade supplier responses.
5. Select a user or a team for **User/Team** field and click the **Add** button.

   > ⓘ Note
   >
   > If you want to create a new team or manage team members on a team before adding the team to the task, refer to Adding Team Members to Guided Sourcing Events [page 261] in the *Managing events with guided sourcing* guide.
6. **Optional:** Add the description, due date, or any other values for the **Review for team grading** task as required.
7. Click the **Submit** button.

   > ⓘ Note
   >
   > If a predecessor phase or task is added to the **Review for team grading** task, the **Submit** button is unavailable and the task cannot be initiated if the predecessor phase or task is not complete.

Task overview: Team Grading in Guided Sourcing Events [page 617]

Related Information

Assigning Weights to Graders [page 619]
Using Grading Groups To Restrict Grading for Sections and Items [page 620]
Grading Supplier Responses as a Team Grader in Guided Sourcing [page 623]
Adjusting Consensus Grades in Guided Sourcing [page 624]
Creating a Review Task in a Guided Sourcing Full Project [page 209]

Grading Supplier Responses as a Team Grader in Guided Sourcing

Once you are notified of a **Review for team grading** task, you need to grade supplier responses for the task. You can use this procedure to grade supplier responses on the **Grade as team member** page.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event, or be one of the reviewers of the **Review for team grading** task.
- You must use an RFP or RFI event with:
    - The event rule **Enable scoring on participant responses** enabled
    - Supplier responses to grade that are not auto-graded
    - A **Review for team grading** task that is in progress

Procedure

1. Open the event in which you want to grade supplier responses.
2. Click the more actions icon (···) in the upper-right corner of the event page and choose **Event scoring options** > **Grade as team member**.

   The **Grade as team member** page opens.
3. Choose one of the following methods to view supplier responses:
    - Click **Expand all** in the lower-left corner of the grading page to view supplier responses to all event content.
    - Select a specific item or question in the **Select item or question** dropdown list to view supplier responses to a specific event content. You can go through all items and questions by clicking the **Next** and the **Previous** buttons.
4. **Optional:** Click the calculator icon ( ) next to system-calculated grades to view the formula used to calculate automatic grades.

> ⓘ Note
>
> Team members cannot edit automatic grades as the grades are calculated by the system based on defined rules.

5. Assign grades to each gradable item.

> ⓘ Note
>
> - The grade value must be a number between 0 and 100, with 100 being the best possible grade.
> - Section-level grades are rolled up for primary and alternative bids.
> - Graders can submit grades through the offline grade sheet only for primary bids.
> - A section cannot be graded if the items in it have not been bid.

6. **Optional:** Click the comment icon ( ) next to gradable items to add comments to indicate your reasons for giving specific grades.
7. To see the total grade for a supplier response in the column header, click the **Update Total Grade** button.

   If you close the page without saving or submitting, the grades of the terms and the total grade calculated are lost. You'll have to enter the grades again and click **Update Total Grade**.
8. When you are done assigning grades:
   - Click the **Save** button to save your grades but not apply them to consensus grades.
   - Click the **Submit** button to submit your grades and apply them to consensus grades.

Task overview: Team Grading in Guided Sourcing Events [page 617]

Related Information

Assigning Weights to Graders [page 619]
Using Grading Groups To Restrict Grading for Sections and Items [page 620]
Initiating Team Grading in Guided Sourcing [page 621]
Adjusting Consensus Grades in Guided Sourcing [page 624]

Adjusting Consensus Grades in Guided Sourcing

After team graders grade supplier responses, you can use this procedure to review or adjust consensus grades on the **Consensus grading** page.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.

- You must be the event owner or have project owner capabilities for the event.
- You must use an RFP or RFI event with:
  - The event rule **Enable scoring on participant responses** enabled
  - Supplier responses to grade that are not auto-graded
  - A **Review for team grading** task that is in progress

Procedure

1. Open the event in which you want to review or adjust consensus grades.
2. Click the more actions icon (▫▫▫) in the upper-right corner of the event page and choose **Event scoring options** › **Consensus grading**.

   The **Consensus grading** page opens.
3. Choose one of the following methods to view supplier responses:
   - Click **Expand all** in the lower-left corner of the grading page to view supplier responses to all event content.
   - The table can show the responses from up to 20 participants, as specified by the Maximum suppliers for grading table on the guided sourcing grading page (`Application.AQS.MaxDisplaySuppliersGSInGradingTable`) parameter. An administrator for your site can change the value of this parameter using the Intelligent Configuration Manager; the maximum value is 40 (show the responses from up to 40 participants).
   - Select a specific item or question in the **Select item or question** dropdown list to view supplier responses to a specific event content. You can go through all items and questions by clicking the **Next** and the **Previous** buttons.
4. **Optional:** Click the team icon ( ) next to each grade to view the grades and comments of team graders.
5. **Optional:** Click the calculator icon ( ) next to system-calculated grades to view the formula used to calculate automatic grades.
6. Assign grades or adjust grades that you are not satisfied with.

   > ⓘ Note
   > - The grade value must be a number between 0 and 100, with 100 being the best possible grade.
   > - Section-level grades are rolled up for primary and alternative bids.
7. To see the total grade for a supplier response in the column header, click the **Update Total Grade** button.

   If you close the page without saving or submitting, the grades of the terms and the total grade calculated are lost. You'll have to enter the grades again and click **Update Total Grade**.
8. Click the **Submit** button.

Task overview: Team Grading in Guided Sourcing Events [page 617]

Related Information

Assigning Weights to Graders [page 619]
Using Grading Groups To Restrict Grading for Sections and Items [page 620]
Initiating Team Grading in Guided Sourcing [page 621]
Grading Supplier Responses as a Team Grader in Guided Sourcing [page 623]

Automatic Grading (Pre-Grading) in Guided Sourcing Events

You can configure automatic grading (auto-grading or pre-grading) to automatically grade supplier responses for questions or line item terms in an event.

> ⓘ Note
>
> Automatic grading is referred to as pre-grading in the classic SAP Ariba Sourcing user interface.

Automatic grading (auto-grading or pre-grading) enables you to define rules before publishing an event to automatically assign grades to supplier responses. You can use auto-grading in guided sourcing events to save time and make objective decisions, and to calculate the Most Economically Advantageous Tender (MEAT) offer.

Automatic grading in guided sourcing events includes features to:

- Configure settings before an event is published to assign grades to response values. Grades can be based on fixed values or relative values, such as the minimum or maximum value of submitted responses. For example, you can configure a term so that the lowest response value is the "ideal" response and receives a 100% grade.
- Use Current Minimum Value (CurrentMinValue) and Current Maximum Value (CurrentMaxValue) formula functions to determine relative scores based on the minimum and maximum values of all submitted values for a term.

> ⓘ Note
>
> Only quantifiable answers can be automatically graded. Quantifiable answers include responses to **Yes/No** questions, **Single choice** questions, **Multiple choices** questions, **Number** questions, and **Date** questions.

You can configure automatic grading options:

- At the in templates for questions [page 627]
- At the in events level for questions or item terms [page 629]

During the event creation phase, you can use the **Set weight** button in the **Items that need quotes** or the **Questions, requirements, and attachments** panel to open the **Set grading weight** page and define automatic grading rules.

When bidding closes and the event moves to the **Review responses** state, you can review supplier responses and adjust auto-grades calculated by the system on the **Adjust Grades** page or the **Consensus grading** page.

For more information about automatic grading, refer to Pre-grading questions in events in Grading and Scoring.

Configuring Automatic Grading (Pre-Grading) for Questions in an Event Template [page 627]

Configuring Automatic Grading (Pre-Grading) Options in a Guided Sourcing Event [page 629]
Inheriting and Importing Content with Automatic Grading for Guided Sourcing Events [page 631]

Parent topic: Grading and Scoring in Guided Sourcing Events [page 613]

Related Information

About Weights in Guided Sourcing Events [page 614]
Grading Supplier Responses in Guided Sourcing Events [page 616]
Team Grading in Guided Sourcing Events [page 617]
Viewing Scorecards and Generating Reports in Guided Sourcing [page 633]

Configuring Automatic Grading (Pre-Grading) for Questions in an Event Template

Use this procedure to configure automatic grading (auto-grading, or pre-grading) options to automatically grade supplier responses.to questions in 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.

Context

> ⓘ Note
>
> Automatic grading is referred to as pre-grading in the classic SAP Ariba Sourcing user interface.

Auto-grading allows you to define rules before publishing an event to automatically grade supplier responses. A template creator can configure auto-grading for questions in an event template. (Event administrators can configure auto-grading for line item terms and questions in a draft event.)

Procedure

1. On the SAP Ariba Sourcing UI, click **Manage** > **Templates** or click **Manage templates** in the Quick links section of the **For You** dashboard.

   The **Templates** page appears.
2. From the **Documents** tab on the **Templates** page, click the name of the event template in which you want to configure auto-grading options and choose **Action** > **Open**.
3. If the template is not in the **Draft** state, navigate to the **Overview** tab. In the **Properties** pane, select **Actions** > **Template** > **New Version**.
4. Navigate to the **Documents** area. Click the event name, then click **Action** > **Edit**.
5. In the **Bidding Rules** section, set the **Enable scoring on participant responses** field to **Yes**.
6. Navigate to the **Content** tab.
7. Click **Add** and choose **Question**.
8. Add the required questions.
9. Return to the **Content** tab. Navigate to the **Display** field in the upper-right corner and select **Scoring**.
10. In the **Pre-grade** column, choose **Yes** from the dropdown.
11. Configure options based on the response type.
    - For **Yes/No** questions or responses from a list of choices (**Single choice** or **Multiple choices** responses):
      - Select a grade for each possible response.
    - For reponses that accept values manually entered by the participant, select one of the following choices:
      - **Pre-grade**.
        You can specify minimum (**From**) and maximum (**To**) limits. Specify an **Ideal** value. Responses that match the **Ideal** value receive a 100% grade; grades for other responses in the range are scaled accordingly. For the **From**, **To**, and **Ideal**fields, you can either enter a fixed value or choose **Minimum** or **Maximum**. If you choose **Minimum** or **Maximum**, the minimum or the maximum of the bid values is assigned to that field.
      - **The lower the value, the better**: Here, the ideal response would be the lowest response value and scoring is calculated based the formula Ideal response / Suppliers submitted value.
      - **The higher the value, the better**: Here, the ideal response would be the highest response value and scoring is calculated based the formula Suppliers submitted value / Ideal response.

    For more information about pre-grade options, including information about how grades are scaled for manually entered response values, refer to Pre-Grading (Automatic Grading) in Grading and Scoring.

Results

When a user creates an event using this template, the user can view the questions and the grading options in the event. If required, the user can also edit these configurations in the event [page 629].

Task overview: Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]

Related Information

Configuring Automatic Grading (Pre-Grading) Options in a Guided Sourcing Event [page 629]
Inheriting and Importing Content with Automatic Grading for Guided Sourcing Events [page 631]

Configuring Automatic Grading (Pre-Grading) Options in a Guided Sourcing Event

Use this procedure to configure automatic grading (auto-grading, or pre-grading) options to automatically grade supplier responses to questions and line item terms in an event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- The event rule **Enable Scoring on Participant Responses** must be enabled. If this rule is not visible in your event, contact a member in the **Template Creator** group to delegate this rule in the event template.

Context

You can configure auto-grading options for terms and questions when creating or editing a guided sourcing event.

Procedure

1. When you are creating [page 76] or editing [page 252] an event, navigate to the **Items that need quotes** or **Questions, requirements, and attachments** panel and add items or questions. After you have added content, a **Set weight** button is visible at the top of the panel. Click **Set weight**.

   The **Set grading weight** page appears.
2. Set appropriate weights to the items and terms.
3. Click the **Auto-grade** toggle to view the auto-grade options.
4. Configure options based on the response type.
   - For **Yes/No** questions or responses from a list of choices (**Single choice** or **Multiple choices** responses):
     - Select a grade for each possible response.
   - For reponses that accept values manually entered by the participant, select one of the following:
     - **Pre-grade**.

You can specify minimum (**From**) and maximum (**To**) limits. Specify an **Ideal** value. Responses that match the **Ideal** value receive a 100% grade; grades for other responses in the range are scaled accordingly. For the **From**, **To**, and **Ideal** fields, you can either enter a fixed value or choose **Minimum** or **Maximum**. If you choose **Minimum** or **Maximum**, the minimum or the maximum of the bid values is assigned to that field.
For example, for the term Lead Time, consider you set **From** = **Minimum**, **To** = **Maximum**, and **Ideal** = **Minimum**.

If supplier response is...	then...
Supplier A = 10	From = 10
Supplier B = 20	To = 20
Supplier C = 15	Ideal = 10

Here, Supplier A's response is ideal and hence gets a 100% score.

- **The lower the value, the better**: Choose this option for terms like Price (in an upward bidding event). Here, the ideal response would be the lowest bid value and scoring is calculated based the formula **Ideal response / Suppliers submitted value**.
  According to the suppliers' responses mentioned in the previous example, ideal response is 10 and scoring for each supplier is calculated as follows:

Supplier A	10/10 =1 or 100%
Supplier B	10/20 = 0.5 or 50 %
Supplier C	10/15 = 66.67%

  Here, Supplier A's reponse is the least value and hence gets a 100% score.

- **The higher the value, the better**:
  Choose this option for terms like warranty period. Here, the ideal response would be the highest bid value and scoring is calculated based the formula **Suppliers submitted value / Ideal response**.
  According to the suppliers' responses mentioned in the previous example, Ideal response is 20 and scoring for each supplier is calculated as follows:

Supplier A	10/20 = 0.5 or 50%
Supplier B	20/20 = 1 or 100 %
Supplier C	15/20 = 0.75 or 75%

For more information about pre-grade options, including information about how grades are scaled for manually entered response values, refer to Pre-Grading (Automatic Grading) in Grading and Scoring.

5. Click **Save**.
6. Finish configuring the event and publish the event.
7. When bidding closes and the event moves to the **Review responses** state, you can review supplier responses and adjust auto-grades calculated by the system on the **Adjust Grades** page or the **Consensus grading** page.

   The **Adjust Grades** page is available when an event has a **Review for team grading** task that is not started, or has a **Review for team grading** task that is in progress but all supplier responses to grade are automatically graded. If an event has a **Review for team grading** task that is in progress and supplier responses to grade that are not automatically graded, the **Adjust Grades** page is unavailable and event owners or event administrators can adjust automatic grades on the **Consensus grading** page.

Task overview: Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]

Related Information

Configuring Automatic Grading (Pre-Grading) for Questions in an Event Template [page 627]
Inheriting and Importing Content with Automatic Grading for Guided Sourcing Events [page 631]
Guided Sourcing Project and Event Creation [page 76]

Inheriting and Importing Content with Automatic Grading for Guided Sourcing Events

Guided sourcing events can pull in content with values for automatic grading from a template or from the sourcing library.

Importance Values

Grading values for content in classic sourcing and other solutions also include an **Importance** value that is used to calculate the **Overall %** value for a content item. When a guided sourcing event pulls in content from a template or the sourcing library, it uses the **Importance** to calculate the **Weight**; the **Weight** is then used to calculate the **Overall weight**. The **Importance** value is still included in calculations but not explicitly shown.

For example, a section in a guided sourcing event template has the following automatic grading (pre-grading) values:

Name	Weight	Importance	Overall %
Section 1	25		**25%** (25/100)
Question 1.1		5	**12.5%** (4 / (4+4) * 25%)
Question 1.2		5	**12.5%** (4 / (4+4) * 25%)
Section 2	75		**75%** (75/100)
Question 2.1		2	**15%** (2 / (2+8) * 75%)
Question 2.2		8	**60%** (8 / (2+8) * 75%)

In a guided sourcing event created from this template, viewing the scores for the **Questions, requirements, and attachments** table (selecting **Set weight** for the table) shows the following values after setting **Total weight** for the table to 100%:

Name	Overall Weight	Total Weight	Weight	Weight
Questions, requirements, and attachments	**100%**	**100%**		
Section 1	**25**		**25%**	
Question 1.1	**12.5%** (50% * 25)			**50%** (4 / (4+4))
Question 1.2	**12.5%** (50% * 25)			**50%** (4 / (4+4))
Section 2	**75**		**75%**	
Question 2.1	**15%** (20% * 75)			**20%** (2 / (2+8))
Question 2.2	**60%** (80% * 75)			**80%** (8 / (2+8))

Importing Content with Automatic Grading After Event Creation

If an event is created from a template that has questions in the **Questions, requirements, and attachments**table with automatic grading values, the weight for the table is assumed to be 100%. If you import additional content that has automatic grading weight values, sourcing prefills the **Weight** for the item based on (item weight / (100 + item weight)). For example, you have an event with a **Questions, requirements, and attachments** table and you add a section from the sourcing library that has **Weight** = 50. Sourcing prefills the **Weight** for the new section as **33.33%** (50 / (50+100)).

The **Weight** is also updated for any existing items in the table. If the table previously had 4 sections, each with **Weight** = 25%, sourcing reduces the **Weight** for each existing section from 25% (25 / 100) to **16.66%** (25 / (50+100)).

Parent topic: Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]

Related Information

Configuring Automatic Grading (Pre-Grading) for Questions in an Event Template [page 627]
Configuring Automatic Grading (Pre-Grading) Options in a Guided Sourcing Event [page 629]

Viewing Scorecards and Generating Reports in Guided Sourcing

Use this procedure to view the scorecard to review all event content and the grading details of an event. You can also export a scorecard to a spreadsheet which can be viewed or archived offline.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must use an RFP or RFI event with the **Enable scoring on participant responses** event rule enabled.

Context

You can track grading criteria, the **Overall weight** assigned to each piece of event content, and the total grade each supplier has received. If team grading is enabled for an event, you can see how the grades of team graders contribute to the total grade of each supplier. If automatic grading is set up, you can see system calculation formulas.

In addition to reviewing grading details of an event, you can also export the scorecard information to a spreadsheet report. This makes the archiving or distribution of the information easier. For example, you might need to report on grading criteria and grades assigned to each supplier in an event.

Procedure

1. Open the event in which you want to view the scorecard.
2. Click the more icon ( ) in the upper-right corner of the event page and select **Event scoring options** > **View scorecard**.
3. **Optional:** Expand the grading criteria.
4. **Optional:** You can sort the grading information by using one of the following ways:
   - Sort the grading information by total grade: Click the drop-down menu in the upper-right corner of the **Scorecard** page and select a desired sort order.
   - Sort the grading information by individual item grade: Click the more icon ( ) next to each piece of content and select a desired sort order, or clear the selected sort order.
5. **Optional:** Click the team icon ( ) next to each grade to view the grades and comments of team graders.
6. **Optional:** Click the calculator icon ( ) next to system-calculated grades to view the formula used to calculate automatic grades.
7. **Optional:** Click the **Export report** button in the upper-right corner and save the spreadsheet locally.

Task overview: Grading and Scoring in Guided Sourcing Events [page 613]

Related Information

About Weights in Guided Sourcing Events [page 614]
Grading Supplier Responses in Guided Sourcing Events [page 616]
Team Grading in Guided Sourcing Events [page 617]
Automatic Grading (Pre-Grading) in Guided Sourcing Events [page 626]

SAP Ariba Category Management Integration with Guided Sourcing

If your site has SAP Ariba Category Management, you can integrate it with SAP Ariba Sourcing.

Integrating the applications enables the following:

- Viewing the SAP Ariba Category Management analytical cards in a guided sourcing project
- Creating a guided sourcing project initiated from an Initiative in SAP Ariba Category Management

- About Viewing SAP Ariba Category Management Analytical Cards in a Guided Sourcing Full Project [page 635]
- Mapping SAP Ariba Sourcing Region Values to SAP Ariba Category Management Region Values [page 636]
- Selecting Analytical Cards in a Sourcing Project Template [page 638]
- Viewing Analytical Cards in a Guided Sourcing Full Project [page 639]

About Viewing SAP Ariba Category Management Analytical Cards in a Guided Sourcing Full Project

Buyers using SAP Ariba Sourcing and SAP Ariba Category Management can select the SAP Ariba Category Management analytical cards in a guided sourcing project template and view them in a guided sourcing full project.

Buyers can obtain data about the amount spent for a particular category, subcategory, region, or supplier from theSAP Ariba Category Management solution and view the data on the corresponding analytical card in a guided sourcing full project. For more information about SAP Ariba Category Management, see SAP Ariba Category Management.

This feature uses the commodity-to-category mapping and the region-to-region mapping to map data between SAP Ariba Category Management and SAP Ariba Sourcing. While the commodity-to-category mapping is created in SAP Ariba Category Management, mapping between regions in the two applications must be created by customer administrators in SAP Ariba Sourcing.

Buyers can choose one or more analytical cards for which they want to view the spend data. Users belonging to the **Template Creator** group can choose one or more of the following analytical cards in a guided sourcing project template:

- Category Spend
- Spend by Subcategory
- Spend by Region
- Spend by Supplier

Users belonging to the **Category Buyer Analytical Card** group can view the latest spend data in a guided sourcing full project created with a template that has the analytical cards enabled.

To view the analytical cards, the following prerequisites are required:

- Your organization must have the license and an active instance of SAP Ariba Category Management.

- Single sign-on (SSO) authentication must be configured in SAP Ariba Sourcing and SAP Cloud Identity Services – Identity Authentication service. Contact your Designated Support Contact (DSC) to enable it for your site. For more information about SSO authentication, see User authentication and single sign-on using the SAP Cloud Identity Services – Identity Authentication service.
- For SAP Ariba Sourcing to communicate with SAP Ariba Category Management, users belonging to the **Customer Administrator** group must configure the following parameters in the **Intelligent Configuration Manager** workspace:
  - `Application.AQS.CatMan.Enabled`
  - `Application.AQS.CatMan.Hostname`
  - `Application.AQS.CatMan.CatManInitiative.Enabled`
- In SAP Ariba Category Management, purchasing categories must be mapped to the SAP Ariba Sourcing commodities.
- This feature is supported only in 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.
- To be able to select the analytical cards in a guided sourcing template, you must be a member of the global **Template Creator** group or the template project's **Template Creators** team.
- To be able to view the analytical cards in a guided sourcing project, you must be a member of the **Category Buyer Analytical Card** group .

Mapping SAP Ariba Sourcing Region Values to SAP Ariba Category Management Region Values

You can map SAP Ariba Sourcing regions to SAP Ariba Category Management regions.

Prerequisites

You must be a member of the **Customer Administrator** group.

Context

A guided sourcing project in SAP Ariba Sourcing can display the spend by region data after you map SAP Ariba Sourcing regions to SAP Ariba Category Management regions. Customer administrators can use the export data and import data tasks to map the regions.

Procedure

1. Create a Microsoft Excel file to use as a template for the region-to-region data.
   a. From the Ariba Administrator, select **Site Manager** > **Data Import/Export**.
   b. Select the **Export** tab.
   c. Locate the **Export Region-to-Region Mappings** task and click **Export**.

   The Excel file contains the following columns:
   - **Region From**
   - **Region To**
2. Enter the values in the Excel file as follows:
   - **Region From**: Region codes from SAP Ariba Sourcing
   - **Region To**: Region codes from SAP Ariba Category Management

   > Note
   >
   > The mapping between the regions can be one-to-one, one-to-many, or many-to-many. For example, one region in SAP Ariba Sourcing can be mapped to many SAP Ariba Category Management regions or multiple SAP Ariba Sourcing regions can be mapped to a single SAP Ariba Category Management region.
3. Use the **Import Region-to-Region Mappings** task.
   a. From the Ariba Administrator, select **Site Manager** > **Data Import/Export**.
   b. Select the **Import** tab.
   c. Locate the **Import Region-to-Region Mappings** task and click **Import**.
   d. Select the import method you want to use, such as **Create**.
   e. Select the Excel file you edited in the previous step.
   f. Click **OK**.

Results

The regions from SAP Ariba Sourcing are mapped to regions in SAP Ariba Category Management.

Selecting Analytical Cards in a Sourcing Project Template

Template creators can choose the analytical cards of SAP Ariba Category Management in a sourcing project template. Members belonging to the **Category Buyer Analytical Card** group can then view the data for the selected cards in a guided sourcing project.

Prerequisites

To create or edit project templates, you must be a member of the global **Template Creator** group or the **Templates** project's **Template Creators** team group.

Context

You can either create a new sourcing full project template or edit an existing one to choose the cards. To edit an existing template, follow the procedure from step 6.

Procedure

1. On the SAP Ariba Sourcing dashboard, choose **Manage** > **Templates**.
2. On the **Documents** tab, choose **Actions** > **Create Template**.
3. Choose **Sourcing Project** and click **OK**.

   The **Create New Project Template** page opens.
4. Enter a name for the template and an optional description.
5. Choose **Full Project** and click **OK**.
6. Click the **Advanced Options** tab and do the following tasks:
   a. In the **Analytical Cards** section, choose the cards that you want to add to the sourcing project.
   b. Click **Save Analytical Cards**.
7. Click the **Overview** tab.
8. Choose **Actions** > **Publish** to publish the template.

Results

The analytical cards are added in the template. When a guided sourcing project is created with this template, data for the selected cards can be seen in the project.

Viewing Analytical Cards in a Guided Sourcing Full Project

Members belonging to the **Category Buyer Analytical Card** group can view the spend data in the analytical cards in a guided sourcing project.

Prerequisites

You must have a guided sourcing template in which one or more analytical cards are selected.

Procedure

1. On the SAP Ariba Sourcing dashboard, choose **Create** > **Guided Sourcing Project**.

   The **Create guided sourcing project** page opens.
2. Enter a name for the project.
3. Choose **Full Project** as the project type.
4. From the **Commodity** dropdown in the **Project Details** section, choose the commodities for which you want to see the spend data.

   > Note
   >
   > The commodities are mapped to the purchasing category in SAP Ariba Category Management. Therefore, ensure that you choose the correct commodities, as a mismatch can display incorrect data in the analytical card.
5. In the **Templates** section, choose a template in which the analytical cards are selected.
6. Click **Create**.

   The sourcing project opens.
7. Click the **Analytical Insights** tab.

   You can see the analytical cards according to the selection in the template. The cards display the latest data present in SAP Ariba Category Management.
8. (Optional) Click **View category management** to open the SAP Ariba Category Management application.

Contract Workspace Integration with Guided Sourcing

If your site has SAP Ariba Contracts, you can integrate contract workspaces with guided sourcing and perform the following tasks:

- Create contracts from awarded guided sourcing events.
- Add awarded line items to existing contracts.
- View expiring contracts in guided sourcing events.
- Manage baseline contracts and supplier contracts associated with guided sourcing events as part of the pre-award negotiation process.

Viewing Expiring Contracts in Guided Sourcing

You can use information about expiring contracts to plan and create sourcing projects and events for items in the contracts.

You can quickly access key information about your expiring contracts and plan your next steps for each contract from the **For You** dashboard. Contract workspaces that meet the following conditions dynamically show in your **Expiring contracts** tile:

- The expiration date is within the next 45 days.
- The project team includes the user.
- The contract **Commodity** field includes a commodity in the user's commodity preferences.

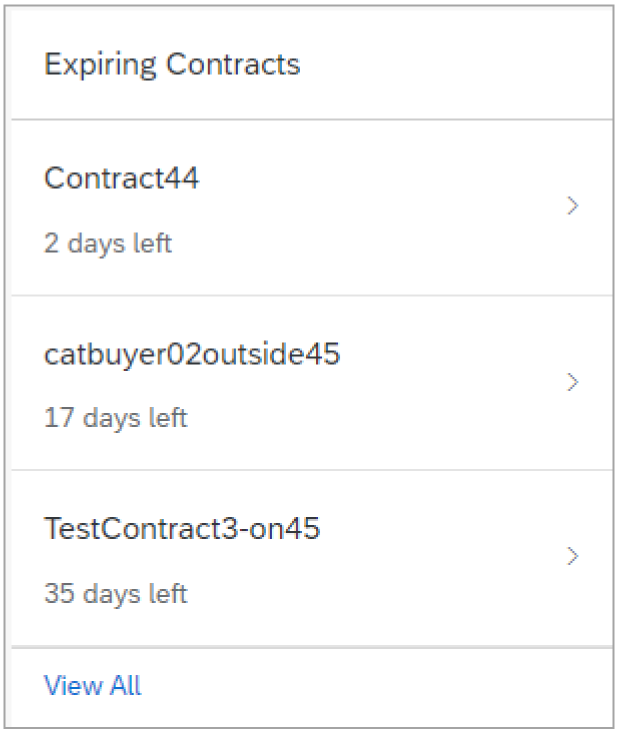
If you have a procurement contract workspace with a line items document, you can create a sourcing project as a follow-on project and add items from the line items document to the follow-on sourcing project.

You must meet the following requirements to view the expiring contracts:

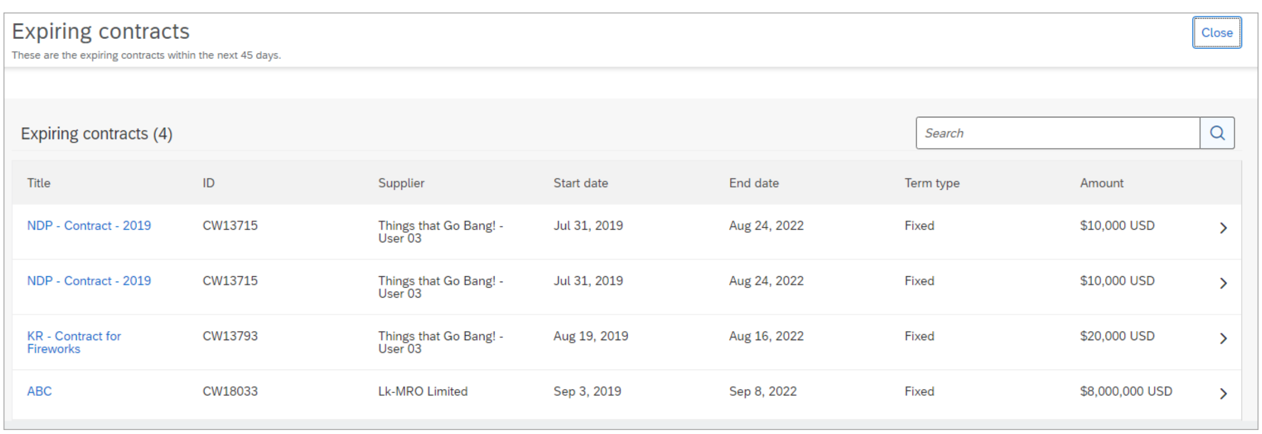
- To use this feature in the **For You** dashboard, your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be a project team member.
- You must be a contact owner.
- You must be a member of the **Customer Administrator** group to run the **CommodityPreferencesUpdateTask** task. For more details, see Running Scheduled Tasks.
- You must configure your **Guided sourcing user preferences** to include the commodity that your expiring contract uses. For more details, see Managing Your Preferred Commodities for Guided Sourcing [page 44] .

> **Note**
>
> A member of the **Customer Administrator** group can run the **CommodityPreferencesUpdateTask** scheduled task to prepopulate a preferred commodity list for each guided sourcing user with the commodities from the events and projects in which the user was a project team member in the past year. This task overwrites any existing preferred commodity lists for guided sourcing users. In most cases, an administrator runs the **CommodityPreferencesUpdateTask** scheduled task once, before a site begins to use preferred commodities lists.

Once you have run the task **CommodityPreferencesUpdateTask** and configured your preferred commodities list, a list of expiring contracts appears in the **Expiring contracts tile** on the **For You** dashboard. The **Expiring contracts** tile displays the 3 contract workspaces with the most immediate expiration dates.



Clicking **View All** opens the **Expiring contracts** page, which displays the 100 most recent expiring contracts.



Title	ID	Supplier	Start date	End date	Term type	Amount
NDP - Contract - 2019	CW13715	Things that Go Bang! - User 03	Jul 31, 2019	Aug 24, 2022	Fixed	$10,000 USD
NDP - Contract - 2019	CW13715	Things that Go Bang! - User 03	Jul 31, 2019	Aug 24, 2022	Fixed	$10,000 USD
KR - Contract for Fireworks	CW13793	Things that Go Bang! - User 03	Aug 19, 2019	Aug 16, 2022	Fixed	$20,000 USD
ABC	CW18033	Lk-MRO Limited	Sep 3, 2019	Sep 8, 2022	Fixed	$8,000,000 USD

The Expiring contracts details page displays the following fields:

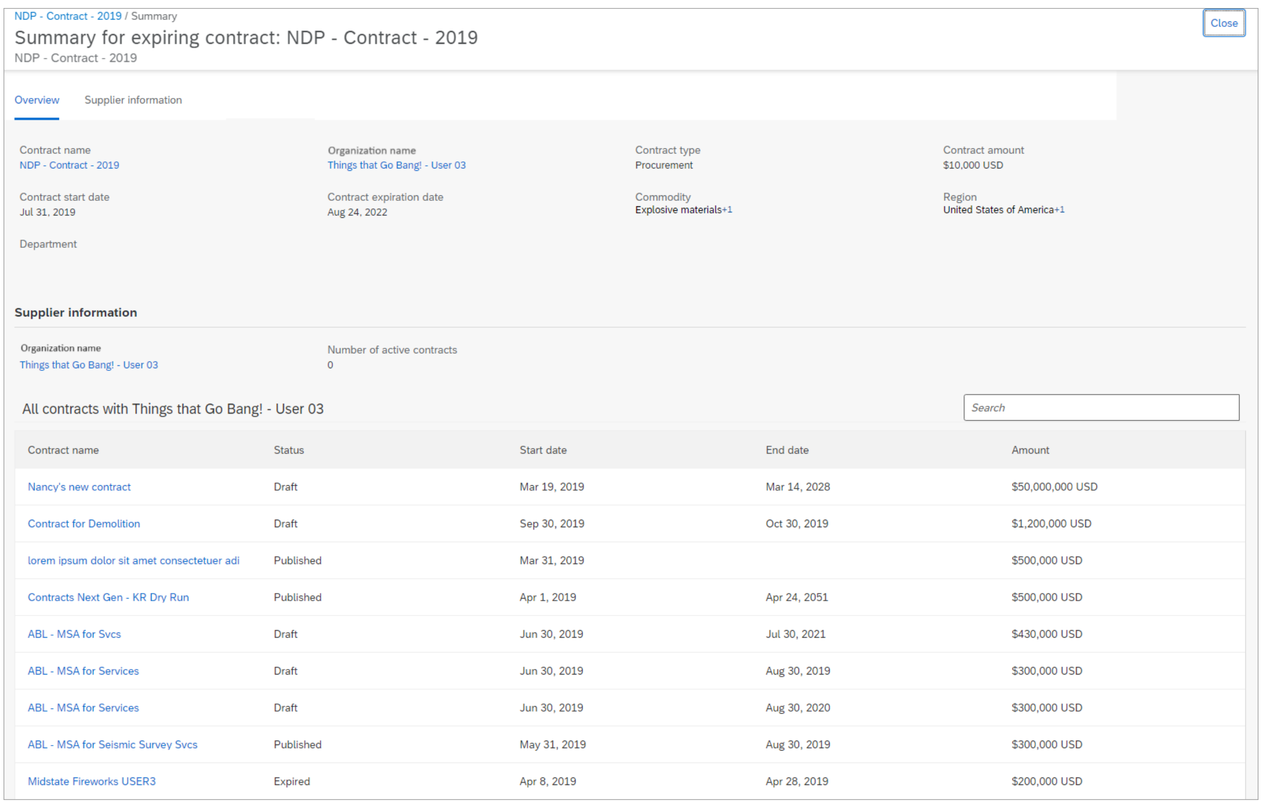
- Title
- ID
- Supplier
- Start date
- End date
- Term type
- Amount

You can access the **Summary for expiring contract** details page in the following ways:

- When you click the right arrow (>) button that links with an expiring contract, the **Summary for expiring contract** details page opens.

> ⓘ Note
>
> Clicking the contract name opens the expiring contract in the contract workspace details page.

- When you select an expiring contract from the **Expiring contracts** tile in the **For You** dashboard, the **Summary for expiring contract** details page opens.



The **Summary for expiring contract** page displays the following sections:

- **Overview**
  - Contract name
  - Organization name
  - Contract type
  - Contract amount

- Contract start date
- Contract end date
- Commodity
- Region
- Department
- **Contract consumption**
  - Contract amount
  - Contract max
  - Spend
  - Total spend

> ⓘ Note
>
> **Contract consumption** is present only when a contract workspace is linked to contract compliance and spend data aggregation is enabled. To link a contract workspace with contract compliance, your SAP Ariba Contracts solution must be integrated with SAP Ariba Procurement solutions. For more information about integrating SAP Ariba Contracts with SAP Ariba Procurement solutions, see Managing Contract Spending from Contract Workspaces and Aggregating Spend Data in Contract Workspaces.

- **Supplier information**
  - Supplier name
  - Number of active contracts
  - A table that displays a list of all current and past contracts with the supplier:
    - Contract name
    - Status
    - Start date
    - End date
    - Amount

Related Information

Creating Follow-On Projects

Creating New Contracts from Awarded Guided Sourcing Events

Use this procedure to create a contract workspace from an award in a guided sourcing event and automatically transfer items and other information to the contract.

Prerequisites

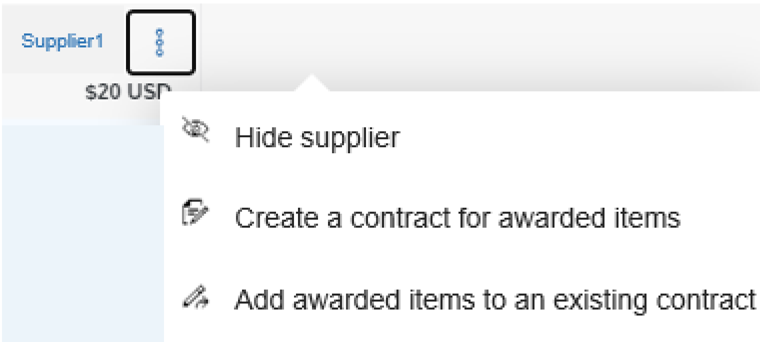
- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You have an award for a guided sourcing event.
- Your site has SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- 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.
- To enable SAP Ariba Sourcing to pass the predecessor event information, in addition to the predecessor project information, to the contract whenever applicable, the **Enable predecessor event identification for contracts created from guided sourcing projects** (`IdentifyPredecessorEventforContractsCreatedFromGuidedSourcingProjects`) ICM parameter must be enabled. For more information, refer to Enable predecessor event identification for contracts created from guided sourcing projects.

Context

You can create a contract in SAP Ariba Sourcing based on the award information of the guided sourcing event. The line items from the award and other information from the event are copied to the new contract you create.

Procedure

1. In the monitor page of SAP Ariba Sourcing, select the **Award** > **Award scenarios** > **Scenario Maker** tab.
2. Click the more actions icon (…) that appears next to the name of the awarded supplier.



3. Select **Create a contract for awarded items**.

   The **Create Project** page appears.
4. Select the contract project type. To create a contract used to purchase items, select **Contract Workspace (Procurement)**.

   The **Create Contract Workspace (Procurement)** page appears.
5. Enter any additional values for the contract. If this is a multi-currency event, select the currency for the contract. Select a template and click **Create**.

   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).
   - Predecessor project information.

   > ⓘ Note
   >
   > If you have created the contract from a guided sourcing full project:
   > - The project name is copied as the predecessor project.
   > - The contract shows the **Predecessor Project** attribute with a link to the guided sourcing full project.
   > - The contract is associated with all the subprojects in the guided sourcing full project.
   >
   > If you have created the contract from a subproject within a guided sourcing full project:
   > - The full project name is copied as the predecessor project and the subproject name is copied as the predecessor event.
   > - The contract shows the **Predecessor Project** attribute with a link to the guided sourcing full project, and the **Predecessor Event** attribute with a link to the subproject.
   > - The contract is not associated with any other subprojects in the guided sourcing full project.
   >
   > If you have created the contract from a single-event guided sourcing project:
   > - The project name is copied as the predecessor project and the predecessor event.
   > - The contract shows the **Predecessor Project** and the **Predecessor Event** attributes, with a link to the same project.

   - Values for the **Regions**, **Commodity**, **Departments**, and **Contract Effective Date** fields in the sourcing event header are copied to the contract header fields.
   - 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.

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

Viewing Expiring Contracts in Guided Sourcing [page 640]
Adding Awarded Line Items from a Guided Sourcing Event to an Existing Contract [page 646]

Adding Awarded Line Items from a Guided Sourcing Event to an Existing Contract

Use this procedure to add items from an awarded guided sourcing event to an existing contract workspace.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- You must be the event owner or have project owner capabilities for the event.
- You have an award for a guided sourcing event.
- 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

You can update an existing contract in SAP Ariba Sourcing with the awarded line items of a guided sourcing event.

Procedure

1. In the monitor page of the guided sourcing event, select the **Award** tab.
2. In the **Award** > **Award scenarios** > **Scenario Maker** tab, locate the awarded supplier and click the more actions icon (…) that appears next to the name of the awarded supplier.
3. Select **Add awarded items to an existing contract**.

   The **Update or Replace existing Contracts** page appears.
4. Enter the **Contract Title** and click **Search**.

   The searched item will be listed in the **Available Contracts** section.
5. Choose the contract and click **Select This Contract**.

   The **Update or Replace?** popup window appears.
6. Select one of the following options:

   - **Replace existing contract**: Select the option to replace the existing line items of the selected contract with the new awarded line items
   - **Update existing contract**: Select the option to update the selected contract with the new awarded line items
7. Click **OK**.

Related Information

Viewing Expiring Contracts in Guided Sourcing [page 640]
Creating New Contracts from Awarded Guided Sourcing Events [page 644]

Viewing Associated Contracts for Guided Sourcing Events

Use this procedure to view contracts associated with guided sourcing events.

Prerequisites

- Your site must have guided sourcing enabled. For more information, see Setting Up Guided Sourcing.
- You must be a member of the **Category Buyer** group
- You must be the event owner or have project owner capabilities for the event.
- You must have an award for a guided sourcing event.
- 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 contract workspaces, such as the **Contract Manager** group.
- If the sourcing event from which you want to create or update a contract is initiated by an RFQ from an external system and contains service outline attributes, ensure that you have enabled the **Enable Export of Service Outline Attributes from Sourcing to Contract** (`Application.ACM.ExportOutlineAttributesFromSourcingToContract`) parameter. For more information about the parameter, see Enable Export of Service Outline Attributes from SAP Ariba Sourcing to SAP Ariba Contracts.

Context

As a buyer, you can get information about the contracts associated with a guided sourcing event on the **Awards** page of the event.

Procedure

1. In the monitor page of the guided sourcing event, select the **Award** tab.
2. Go to the **Associated Contracts** tab to find details of all the contracts that are associated with the guided sourcing event.

   The contract information includes the following:

   Contract Id

   Title

   Supplier

   Expiration Date

   Effective Date

Contract Status

Icertis ID - This column is shown only to customers who have integrated their SAP Ariba Contracts instance with Icertis Contract Intelligence for SAP Ariba Solutions.

The table displays all contracts that you create or update from the event. However, an updated contract is shown in the table only if it's not associated with any other event.

Next Steps

After reviewing the contract information, determine whether you want to create a new contract or update an existing contract for the awarded line items.

Pre-Award Negotiation in Guided Sourcing

Pre-award negotiation allows buyers to engage and negotiate contractual terms with suppliers involved in a guided sourcing project during the commercial negotiation phase or after an initial assessment.

The pre-award negotiation process enables buyers to define the necessary terms and conditions of their sourcing requirement using a baseline contract. The baseline contract serves as the foundation for suppliers to bid and subsequently enables buyers to negotiate with the selected suppliers.

Buyers are able to perform the following tasks as part of the pre-award negotiation process:

- Create and update baseline contracts in guided sourcing events.
- Create and update supplier contracts in guided sourcing events.

Suppliers are able to download the legal contract (Main Agreement) linked to the baseline contract associated with a guided sourcing event before submitting their bid response.

Related Information

Creating a Baseline Contract in Guided Sourcing [page 650]
Updating a Baseline Contract in Guided Sourcing [page 652]
Publishing a Guided Sourcing Event Configured for Pre-Award Negotiation [page 653]
Creating Supplier Contracts in Guided Sourcing Events Configured for Pre-Award Negotiation [page 654]
Updating Supplier Contracts in Guided Sourcing Events Configured for Pre-Award Negotiation [page 657]
Downloading Legal Contract Document During Event Participation

Creating a Baseline Contract in Guided Sourcing

Use this procedure to create a baseline contract from a guided sourcing project or event that is subject to pre-award negotiation.

Prerequisites

- Your site must have guided sourcing enabled. For more information, see Setting Up Guided Sourcing.
- Your site must have SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- Your administrator must enable the **Enable Pre-Award Negotiation In Guided Sourcing events** (`Application.ACM.EnablePreAwardNegotiationInGuidedSourcing`) ICM parameter. For information about this parameter, refer to Enable Pre-Award Negotiation In Guided Sourcing Events.
- To enable SAP Ariba Sourcing to pass the predecessor event information, in addition to the predecessor project information, to the contract whenever applicable, the **Enable predecessor event identification for contracts created from guided sourcing projects** (`IdentifyPredecessorEventforContractsCreatedFromGuidedSourcingProjects`) ICM parameter must be enabled. For more information, refer to Enable predecessor event identification for contracts created from guided sourcing projects.

Context

A baseline contract enables buyers to enter into an agreement with suppliers before a sourcing project or event is awarded. Buyers can associate a baseline contract with a sourcing project or event that is subject to pre-award negotiation.

A baseline contract can be associated with a guided sourcing project or event at any stage until the event is awarded.

Procedure

1. Create a Guided Sourcing Project or Event.

   For information about creating a guided sourcing project or event, refer to Creating a Guided Sourcing Project or Event from a Template [page 80].
2. Click ••• *(More actions)* and select **Associated Contracts**.

   The **Associated Contracts** page appears. On this page, there are two sections which display information and action items related to baseline contracts and supplier contracts respectively. Buyers can find the following information for a baseline contract:

Document Title	The title of the baseline contract.

Contract Status (ARIBA)	The status of the baseline contract in SAP Ariba Contracts.
Contract Status (ICERTIS)	The status of the baseline contract Icertis Contract Intelligence (ICI) for SAP Ariba Solutions.
SAP Ariba ID	The unique identifier of the baseline contract. Buyers can click the ID to navigate to SAP Ariba Contracts and review the baseline contract.
Icertis ID	(Optional) The unique identifier of the corresponding agreement created in Icertis Contract Intelligence (ICI) for SAP Ariba Solutions. This field appears only if you have integrated your SAP Ariba instance with ICI.
Effective Date	The effective date set for the baseline contract.
Expiration Date	The expiration date of the baseline contract.
Update	An option to sync the baseline contract with line item information updates from the sourcing event.

3. To create a baseline contract, select **Create Baseline Contract**.

   A procurement contract workspace is initialized in SAP Ariba Contracts and the **Create Contract Workspace (Procurement)** appears. The **Baseline Contract** (`baselineContract`) attribute of this contract workspace is automatically selected as **Yes**, which is read-only and cannot be modified.
4. Enter any additional values for the contract. If this is a multi-currency event, select the currency for the contract. Select a template and click **Create**.

   After the contract workspace is created, you can find the **Baseline Contract** attribute under the **Overview** section of the contract workspace. A link to the sourcing project from where you created the baseline contract is shown under the **Process** section.

   > ⓘ Note
   >
   > - If you have created the contract from a single-event guided sourcing project the contract shows the **Predecessor Project** and the **Predecessor Event** attributes, with a link to the same project.
   > - If you have created the contract from a subproject within a guided sourcing full project:
   >   - The contract shows the **Predecessor Project** attribute with a link to the guided sourcing full project, and the **Predecessor Event** attribute with a link to the subproject.
   >   - The contract is not associated with any other subprojects in the guided sourcing full project.
   > - The **Predecessor Project** and the **Predecessor Event** attributes cannot be modified.

Results

A baseline contract is created and associated with the guided sourcing project or event. To verify, open the guided sourcing project or event, click ••• *(More actions)* and select **Associated Contracts**. The baseline contract details are shown under the **Baseline Contract** section.

Next Steps

Continue working on the guided sourcing project or event, or the baseline contract, as required.

> Note
>
> - Only one active baseline contract can be associated with a sourcing project. To associate a new baseline contract with a sourcing project that already has an associated active baseline contract, you must first change the status of the existing baseline contract to **Closed** before associating the new baseline contract.
> - A baseline contract is not available for sourcing awards when you choose to add awarded line items to an existing contract with a supplier.
> - A baseline contract cannot be amended after it is published.

If there are changes to the line items information in the sourcing project or event during the course of the pre-award negotiation process, you can update the baseline contract to synchronize the line items information. For more information, refer to Updating a Baseline Contract in Guided Sourcing [page 652].

Updating a Baseline Contract in Guided Sourcing

Use this procedure to update a baseline contract with line items information from a guided sourcing project or event.

Prerequisites

- A baseline contract must be associated with the guided sourcing project or event and the status of the baseline contract must be **Draft**. For information about associating a baseline contract with a guided sourcing project or event, refer to Creating a Baseline Contract in Guided Sourcing [page 650].
- The guided sourcing project or event must not be in the **Completed** status.

Context

After associating a baseline contract with a sourcing project or event, if there are changes to the line items information in the sourcing project or event as part of the pre-award negotiation process, buyers can update the baseline contract to synchronize the changes.

Procedure

1. Open the guided sourcing project or event in edit mode.
2. Click ••• *(More actions)* and select **Associated Contracts**.

3. Identify the baseline contract that you want to update from the table under the **Baseline Contract** section and click the corresponding **Update** button.

   The contract is opened in the SAP Ariba Contracts UI.
4. Go to the **Documents** tab of the contract workspace.
5. Open the Contracts Line Items Document (CLID) associated with the contract workspace.
6. Verify if the line items information from the sourcing project or event (predecessor project) matches with the details shown in the CLID.

Publishing a Guided Sourcing Event Configured for Pre-Award Negotiation

Use this procedure to publish a guided sourcing event that is configured for pre-award negotiation.

Prerequisites

- Your site must have guided sourcing enabled. For more information, see Setting Up Guided Sourcing.
- Your site must have SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- You must be the event owner or have project owner capabilities for the event.
- Your administrator must enable the **Enable Pre-Award Negotiation In Guided Sourcing Events** ICM parameter. Refer to Enable Pre-Award Negotiation In Guided Sourcing Events.
- The guided sourcing event that you want to publish must be associated with a baseline contract.

Context

Guided sourcing events that have a baseline contract associated with them as part of the pre-award negotiation can be published based on the status of the baseline contract. Buyers can publish a guided sourcing event when the associated baseline contract meets the following conditions:

- It is in the **Published** state.
- It is inactive because its state changed to **Expired** or **Closed**.
- It is deleted.

Procedure

1. Open the unpublished event.
2. **Optional:** Preview the event contents as suppliers (participants) will see them.
   a. Go to the **Suppliers** table.

b. Click the more icon (···) next to a supplier name and select **Preview as supplier**.

   The event contents for the selected supplier are shown.

c. After previewing the contents, click **End Preview** in the upper-left corner.

3. Click the **Publish** or **Submit** button in the upper-right corner of the event.

   If the event has an **Approval For Publish** task, the **Submit** button is displayed instead of a **Publish** button. You first submit the event for approval. When it's approved, it's automatically published.

   After you click **Publish** or **Submit**, the SAP Ariba solution checks the event for the required term fields and the status of the baseline contract associated with it. The event is not published if:

   - A term has no value for a required field. An error message is displayed in the table entry for the term.
   - The baseline contract has a status other than **Published**, **Expired**, or **Closed**.

Results

When your event is published, email notifications about the event are sent to the suppliers (participants) you invited. For more information about managing event notifications, refer to Working with Automatic Event Notifications. If the event has the **Enable document URL terms** rule enabled and the `DocumentURLOutBound` and `DocumentStatusChangeNotification` web services are implemented for your site, the web services retrieve URLs that participants can click to retrieve documents from your site.

Creating Supplier Contracts in Guided Sourcing Events Configured for Pre-Award Negotiation

Use this procedure to create supplier contracts in guided sourcing events set up for pre-award negotiation.

Prerequisites

- Your site must have guided sourcing enabled. For more information, see Setting Up Guided Sourcing.
- Your site must have SAP Ariba Contracts integrated with SAP Ariba Sourcing.
- Your administrator must enable the **Enable Pre-Award Negotiation In Guided Sourcing events** (`Application.ACM.EnablePreAwardNegotiationInGuidedSourcing`) ICM parameter. For information about this parameter, refer to Enable Pre-Award Negotiation In Guided Sourcing Events.
- The guided sourcing project must be of type **Single event**.
- The guided sourcing event must be in one of the following phases: **Published**, **Monitor**, **Pending Selection**, **Review responses**, **Open**, or **Paused**.
- A baseline contract must be associated with the guided sourcing event and its status must be **Published**. For information about associating a baseline contract with a guided sourcing event, refer to Creating a Baseline Contract in Guided Sourcing [page 650].

Context

A supplier contract is a copy of the baseline contract associated with a guided sourcing event. Buyers can create a contract for a suppliers who have submitted their bids for line items added to the event.

Buyers can choose to create supplier contracts in bulk when there are multiple suppliers participating in an event.

Procedure

1. Create a Guided Sourcing Project or Event.

   For information about creating a guided sourcing project or event, refer to Creating a Guided Sourcing Project or Event from a Template [page 80].
2. Click ••• *(More actions)* and select **Associated Contracts**.

   The **Associated Contracts** page appears. On this page, there are two sections which display information and action items related to baseline contracts and supplier contracts respectively. Buyers can find the following information for a supplier contract in the **Supplier Contract** section under the **Contracts** tab:

Supplier	The name of the supplier.
Document Title	The title of the supplier contract.
Contract Status	The status of the supplier contract.
Contract Status (ICERTIS)	(Optional) The status of the agreement created in Icertis Contract Intelligence (ICI) for SAP Ariba Solutions in correspondence to baseline contract. This field appears only if you have integrated your SAP Ariba instance with ICI.
SAP Ariba ID	The unique identifier of the supplier contract. Buyers can click the ID to navigate to SAP Ariba Contracts and review the supplier contract.
Icertis ID	(Optional) The unique identifier of the corresponding agreement created in Icertis Contract Intelligence (ICI) for SAP Ariba Solutions. This field appears only if you have integrated your SAP Ariba instance with ICI.
Effective Date	The effective date set for the supplier contract.
Expiration Date	The expiration date of the supplier contract.
Update	An option to update a supplier contract with awarded line item information. ⓘ Note This option is available only after all the line items in the guided sourcing event are awarded.
3. To create a supplier-specific contract, select **Create Contract**.

   A dialog box **Select Suppliers for Contract Creation** appears where all the suppliers invited for participation are shown. The following information is shown for each supplier:

Supplier	The name of a supplier invited to participate in the event.

Contract ID	The ID of the existing supplier-specific contract created for a supplier.
Bid Invite Status	The response of a supplier to the bid invitation.

4. Select a supplier for whom you want to create a contract and then select **Ok**.

   You can select multiple suppliers from the list per your requirement.

   > ⓘ Note
   >
   > You can select only those suppliers who have submitted a bid response and who do not have an ongoing contract creation task in progress.

Results

A batch job is initiated to create contracts for the selected suppliers. The progress of the batch job can be monitored in the **Creation History** tab which shows the historical data of all the supplier contract creation requests initiated in the event. All the details from the baseline contract, including the predecessor project information, are copied to the supplier contract.

> ⓘ Note
>
> The predecessor project information includes the **Predecessor Project** and the **Predecessor Event** attributes, both pointing to the the single-event guided sourcing project from which the baseline contract is created.

The following details are recorded in the **Creation History** tab.

Supplier	The name of the supplier.
Created On	The date and time when the supplier contract creation request was initiated.
Status	The status of the contract creation request. ⓘ Note When you initiate the contract creation process, the status is set to **Submitted**. During the contract creation process, the status of the supplier contract changes to **In progress**. After the contract is created, the status is set to **Completed**.
Error Message	Details of the error encountered, if any, while creating a supplier contract.

After the contracts are created, they are displayed in the **Contracts** tab. For each supplier contract, a review task is automatically created on the associated Main Agreement document and assigned to the supplier. For more information about review tasks, refer to Creating Review Tasks.

> ⓘ Note
>
> If you have integrated your SAP Ariba instance with ICI, the review task is not created.

Updating Supplier Contracts in Guided Sourcing Events Configured for Pre-Award Negotiation

Use this procedure to update a supplier contract in a guided sourcing event configured for pre-award negotiation.

Prerequisites

- The status of the guided sourcing event must be **Completed**.
- The status of the baseline contract associated with the guided sourcing event must be **Published**.

Context

After awarding line items in a guided sourcing event, you can review the corresponding contract of the supplier to whom the line items were awarded to verify the line items information.

Procedure

1. Open the awarded guided sourcing event in edit mode.
2. Click ••• *(More actions)* and select **Associated Contracts**.
3. Identify the supplier contract that you want to update from the **Supplier Contract** section and click the corresponding **Update** button.

   The contract is opened in the SAP Ariba Contracts UI.
4. Go to the **Documents** tab of the contract workspace.
5. Open the Contracts Line Items Document (CLID) associated with the contract workspace.
6. Verify if the line items information from the sourcing event (predecessor project) matches with the details shown in the CLID.

Additional Guided Sourcing Features

Automatically Populating Term Values for Material Quote Events in Guided Sourcing from Past Supplier Responses

Use this procedure to configure your material quote event templates to use past supplier responses in awarded material quote events to automatically populate term values for material quote events in guided sourcing.

Prerequisites

To create or edit templates, you must be a member of one of the following:

- **Customer Administrator** group (access to this group must be approved by SAP Ariba)
- **Template Creator** group
- **Template Creators** group on the **Team** tab of the template project

Context

When you create a material quote event in guided sourcing, SAP Ariba automatically identifies the most recent awarded material quote event with the same materials, terms, and supplier. If an awarded material quote event with the same materials, terms, and supplier exists, SAP Ariba automatically populates the new event with term values from the existing event.

> ⓘ Note
>
> The following answer types are not supported for automatic population of term values:
>
> - **Attachment**
> - **Certificate**
> - **Address**
> - **Product questionnaire**
> - **Percentage**
> - **Factory**

Procedure

1. Go to **Manage** > **Templates** or click **Manage templates** in the Quick links section of the **For You** dashboard.
2. Open a material quote event template for editing.
3. In the **Content** section of the event template, **Edit** an item or create a new item.
4. **Edit** or create a term for the item.
5. On the **Edit Term** page, set **Use participant-specific initial values?** to **Yes**.

Next Steps

When you create a material quote event in guided sourcing, SAP Ariba compares item terms that have **Use participant-specific initial values?** set to **Yes** against the most recent awarded material quote event. If the materials and supplier match, and there are matching terms, your new material quote event automatically populates term values for the matching terms from the previously awarded event.

Customer Feedback Popup for Guided Sourcing

A customer feedback popup appears at various points during the guided sourcing workflow.

The customer feedback popup allows buyers to rate the experience of creating and awarding a guided sourcing event, and to add comments about their experience. SAP Ariba uses this feedback to improve the quality and usability of future sourcing products. The customer feedback popup appears monthly.

Supplier Anonymization

In guided sourcing, supplier information can be anonymized in all pages, popups, dialog boxes, and reports for published RFPs, RFIs, and auctions until the events are closed for bidding. When supplier information is anonymized, attachments in the events are not accessible to buyers during bidding to protect bidders' identities.

When supplier information is anonymized, you could notice any of the following:

- Real-time supplier data is hidden from the guided sourcing interface
- Real-time supplier data is replaced with generic data
  For example, the supplier name could appear as **Company 1** to protect the bidder's identity.

At the template level, you can set your preference to anonymize supplier information for guided sourcing events by enabling the **Anonymize suppliers** rule and defining the scope for the anonymization. For more information, refer to Anonymize suppliers. You can enable the template to automatically stop the anonymization when the event moves to either the review responses or the completed stage.

> ⓘ Note
>
> Supplier anonymization is not supported in bid analysis and optimization scenarios.

You can manually stop the anonymization by using either the guided sourcing user interface or the Event Management API. For more information, refer to Stopping Supplier Anonymization for Guided Sourcing Events [page 660] and Stopping Supplier Anonymization with the Event Management API.

Stopping Supplier Anonymization for Guided Sourcing Events

If you stop anonymization, supplier information will be visible in all pages, popups, dialog boxes, and reports for the event.

Prerequisites

- You must be the event owner or have project owner capabilities for the event.
- The event must be created from a template with the following Project Owner Actions rule settings:
  - **Anonymize suppliers**: **Yes**
  - **Stop anonymization when**: **Manual Intervention**
- The guided sourcing event must be in the published, monitor, or review responses state.

Context

When the **Anonymize suppliers** rule is enabled and the scope for the anonymization is defined in the guided sourcing event template, the supplier information is anonymized in all pages, popups, dialog boxes, and reports for the published RFPs, RFIs, and auctions until the events are closed for bidding. Anonymization is stopped automatically when the event moves to the review responses or the completed stage, if the **Stop anonymization when** rule in the event template is set to at least one of the following options:

- **Reviewing Responses**
- **Status Complete**

If **Stop anonymization when** is instead set to **Manual Intervention**, you can manually stop anonymizing supplier information by using the guided sourcing user interface. If you want to manually stop the anonymization by using the Event Management API, refer to Stopping Supplier Anonymization with the Event Management API.

> ⚠ Restriction
>
> Supplier anonymization is not supported in bid analysis and optimization scenarios.

Procedure

1. Open a guided sourcing event where supplier anonymization is enabled, and the event is in the published, monitor, or review responses state.
2. Click the *More* menu (•••) in the upper-right corner of the event page and select the **Stop supplier anonymization** menu option.

   A popup is displayed.
3. Click **Stop** to stop supplier anonymization.

   Click **Cancel** to cancel the stop supplier anonymization request.

Results

- If you click **Stop**, anonymization is stopped for the specified event and real-time supplier information is displayed in all pages, popups, dialog boxes, and reports for the event.
- If you click **Cancel**, the stop supplier anonymization request is canceled.

Sourcing Support Desk in Guided Sourcing

The Sourcing Support Desk (SSD) is a service where SAP Ariba resources review guided sourcing events of buyers in draft format and provide general recommendations for best practices in event setup. When the review is completed, a document is emailed to buyers, documenting the findings of the reviewers.

Buyers can request an SSD review within the draft stage of each eligible event, including RFI, RFP, and auction (either created as a single-event project or as an event included in a full project). The **More actions** (•••) menu in the upper-right corner of the single-event project page provides the **SAP Ariba Review** option. Buyers can select this option to submit their review request to the SAP Ariba SSD service personnel who will then follow up on the review request.

The SAP Ariba SSD service personnel will provide: non-commodity specific advice regarding site functionality, online bidding formats, lotting structure, bidding parameters, supplier communication and management, and other aspects of a project. Recommendations are not commodity or industry specific, and the SSD service personnel are not obligated to draft original content or to edit any written materials. The SSD service is available in English with a target response time of 24 hours after submission from Monday to Friday (US), excluding US weekends and public holidays. Reviews can be delivered in other major European languages, at SAP's discretion, and with a longer response time. Please note, special hours might apply between December 24th and January 2nd.

Event Day Management in Guided Sourcing

The Event Day Management (EDM) service enables buyers to allow SAP Ariba support to manage their guided sourcing projects as an SAP Ariba Customer Support administrator, helping them resolve technical problems and make sure of smooth execution of their online negotiations.

The SAP Ariba Customer Support administrator is a superuser and has the permission to execute all the admin functionalities.

> Note
>
> To help SAP Ariba support effciently identify sourcing events from different buyers, we recommend that buyers using EDM to put their organization name in the title of their events.

Accessing Other Applications from a Guided Sourcing Full Project by Using the Custom Actions Menu

The *custom actions* menu enables you to access other applications from a guided sourcing full project.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- The guided sourcing full project must be created from a template with the following Custom Actions Menu Settings:
  - **Enable custom actions menu**: Yes

Context

Depending on the configurations done by your organization for the guided sourcing full project template, the *custom actions* menu appears in the guided sourcing full projects that are created from the template. You can quickly access other applications from a guided sourcing full project by using the *custom actions* menu. You can get updates from other applications reflected in the guided sourcing full project.

Procedure

1. Open your guided sourcing full project.
2. Click the *custom actions* menu from the relevant section in the full project page.

   A popup opens.

   > Note
   >
   > Contact your template administrators to obtain the *custom actions* menu name.

   1. Click the open new tab icon ( ) to open the other application in a new tab.
   2. Once you finish with your updates in the other application, click **Close** in the guided sourcing popup.

Results

The updates from the other application (related to the guided sourcing full project) are reflected in the guided sourcing full project.

Accessing Other Applications from a Guided Sourcing Event by Using the Custom Actions Menu

The *custom actions* menu enables you to access other applications from a guided sourcing event.

Prerequisites

- Your site must have guided sourcing enabled and you must be a member of the **Category Buyer** group.
- The event must be created from a template with the following Custom Actions Menu Settings:
  - **Enable custom actions menu**: Yes

Context

Depending on the guided sourcing event template configurations done by your organization, the *custom actions* menu appears in the guided sourcing event. You can quickly access other applications from a guided sourcing event by using the `custom actions` menu. You can get updates from other applications reflected in the guided sourcing event.

Procedure

1. Open a guided sourcing event for editing. If the event is published, click the **More actions** icon •••) in the upper-right corner of the event page and select **Event options** > **Edit event**.
2. Click the `custom actions` menu from the relevant section in the event page.

   A popup opens.

   > Note
   >
   > Contact your template administrators to obtain the `custom actions` menu name.

   1. Click the open new tab icon ( ) to open the other application in a new tab.
   2. Once you finish with your updates in the other application, click **Close** in the guided sourcing popup.

Results

The updates from the other application (related to the guided sourcing event) are reflected in the guided sourcing event.

Task, Phase, Document, and Folder Detail Fields in Guided Sourcing Full Projects

This reference provides descriptions and explanations of detail fields for objects in a guided sourcing full project.

The following tables list the available detail fields for tasks, phases, documents, and folders in guided sourcing full projects.

- Tasks
- Phases
- Documents
- Folders

Tasks

Table 1:

Field name	Task type	Default Value	Is this field required?	Description
Name	All	No entry	Yes	The name of a task.
Owner	All	The user who creates the task	No	The user responsible for a task. See Task Owners and Participants for more information.
Due date	All	No entry	No	The date when a task should be completed. Supports either a fixed date or an interval of days after the parent phase starts. If you set an interval-based due date for a task that is not in a phase, the interval uses the project's start date. This field must have a value for a task to trigger pending and overdue notifications.

Field name	Task type	Default Value	Is this field required?	Description
Display after	All	The bottom-most item in the table or phase where the new item is being added	No	Determines a task's position in the **Tasks** table.
Description	All	No entry	No	Text field for adding details about a task. Supports basic formatting options like changing the text color and adding emphasis.
Start date	To-do Review Approval	No entry	Read-only field	System-populated field that records the date a user submits a task or sets a task to started.
End date	To-do Review Approval	No entry	Read-only field	System-populated field that records the date a user sets a task to complete or a task's approval flow completes.
Required	To-do Review Approval	**Yes**	Required for notification tasks, optional for all task types	Indicates whether a task must be completed. A project can't be set to **Complete** if there are incomplete required tasks.
Milestone	To-do Review Approval	No	No	Indicates whether a task's completion represents a major part of the overall project workflow. See Task Milestones for more information.
Alert	All	No entry	No	Provides a visual cue for a task's importance. See Task Alerts for more information.

Field name	Task type	Default Value	Is this field required?	Description
Observers	To-do Review Approval	No entry	No	Specifies users who can view a task but can't complete actions related to it. See *Observers* in Task Owners and Participants for more information.
Lock document	To-do Review Approval	**No**	No	When set to **Yes**, prevents users other than the owner from creating a new version of a task's document while the task is in progress. However, users with appropriate access to the document can unlock it from the **Events and other documents** table.
Predecessors	All	No entry	No	Designates tasks or phases that must be completed before starting the current task. See Enforcing Task Order with Predecessor Tasks and Phases for more information.
Notification profile	To-do Review Approval	**Default**	No	Controls the settings for a task's due-date-related notifications.
Notification on comment	All	**No**	No	Specifies whether task participants (task owners, approvers, and observers) receive an email notification when a user adds a comment to a task.
Reviewer can edit	Review	**No**	No	When set to **Yes**, allows internal reviewers to make changes directly to a task's document while the task is in progress.

Field name	Task type	Default Value	Is this field required?	Description
Auto-start schedule	Notification	**No**	Read-only in project	Specifies whether a notification task should start after any predecessor tasks or phases are completed, rather than requiring a project owner or task owner to start it manually. Only editable when creating notification tasks in a project template.
Requires manual completion	Notification	**No**	No	Specifies whether a user (either a recipient or the task owner) must manually set a notification task to **Complete**. If this field's value is set to **Yes** and the task is not set to **Complete** before the due date, the task becomes overdue. The overdue task triggers notifications until a user sets the task to **Complete**. If set to **No**, the task automatically completes after triggering each round's notification.

Field name	Task type	Default Value	Is this field required?	Description
Notification schedule	Notification	Multiple	Yes	Group of fields that specify the interval before or after the due date when the task triggers its notification. Recurring notification tasks include additional fields that specify the interval between each notification, as well as an optional end date. Each new round of a recurring notification task adjusts the task's due date to match the intervals defined by the **Notification schedule** fields.
First send date	Notification	No entry	Read-only field	System-populated field that indicates the date a notification task sends the first notification. Calculated based on the values in the **Notification schedule** fields. Only appears on the task details page in the following cases: • The notification task only occurs once • You're viewing the details of the first round of a recurring notification task

Field name	Task type	Default Value	Is this field required?	Description
Next send date	Notification	No entry	Read-only field	System-populated field that indicates the date a notification task sends the next notification. Calculated based on the values in the **Notification schedule** fields. Only appears on the task details page of a recurring notification task for task rounds after the first round.
Recipients	Notification	No entry	Yes	Specifies the users or groups who receive the notification emails triggered by a notification task.

Phases

Table 2:

Field name	Default Value	Is this field required?	Description
Name	No entry	Yes	The name of a phase.
Owner	The user who creates the phase	Read-only field	The **Project Owner** team group is automatically set as the owner of a phase, regardless of which user created it.
Display after	The bottom-most item in the table or phase where the new item is being added	No	Determines a phase's position in the **Tasks** table.
Description	No entry	No	A text field for adding details about a phase. Supports basic formatting options like changing the text color and adding emphasis.

Field name	Default Value	Is this field required?	Description
Alert	No entry	No	Provides a visual cue for a phase's level of importance. See Task Alerts for more information.
Predecessor	No entry	No	Designates tasks or phases that must be completed before starting the current phase. See Enforcing Task Order with Predecessor Tasks and Phases for more information.
Recurring phase	**No**	No	Specifies whether a new version of a phase is created after a set number of months elapse.
Recurrence schedule	Multiple	No	Consists of two fields that specify the number of months between phase occurrences and the day of the month when each phase occurrence is created.
Planned start date	No entry	No	Indicates the expected date for a phase to begin. Editable only after creating a phase. Automatically populates for each instance of a recurring phase based on the values in the **Recurrence schedule** fields.
Start date	No entry	Read-only field	System-populated field that records the date a phase was set to started.

Documents

Table 3:

Field name	Default Value	Is this field required?	Description
Name	No entry	Yes	The name of a document.
Owner	The user who uploads or creates the document	No	The user responsible for a document. Team members who aren't the project owner or in a group that provides project owner permissions must own a document in order to replace it or create tasks associated with it.
Access control	No entry	No	Specifies which users can access a document.
Description	No entry	No	A text field for adding details about a document. Supports basic formatting options like changing the text color and adding emphasis.
Creation date	No entry	Read-only field	System-populated field that records the date a document was uploaded or created.
Last modified	No entry	Read-only field	System-populated field that records the date a document was last edited, published, or replaced.
Version	No entry	No	System-populated field that indicates a document's version. An event's version increases when you edit the event or publish a new version of it, while the version of an uploaded document increases when you edit the document's detail fields, publish it, or replace it.

Folders

Table 4:

Field name	Default Value	Is this field required?	Description
Name	No entry	Yes	The name of a folder.
Owner	The user who creates the folder	No	The user responsible for a folder.
Access controls	No entry	No	Specifies which users can access a folder.
Description	No entry	No	A text field for adding details about a folder. Supports basic formatting options like changing the text color and adding emphasis.

Field name	Default Value	Is this field required?	Description
Version	No entry	No	System-populated field that indicates a folder's version. The following actions affect a folder's version: • Editing a folder's detail fields • Adding or removing folder contents When you edit a folder's detail fields and save your changes, the version automatically increments. For example, if you edit the **Name** field on a folder with the version **v1**, its version automatically increments to **v2** when you save the changes. If you add or remove items from a folder, the folder's new contents are saved as an edited version of the current folder. For example, if you remove a document from a folder with the version **v1**, it's version changes to **v1 (editing)**. To save these changes as a new version of the folder (**v2** for the folder in the previous example), go to the folder details page's **Version history** panel and select **Save as new version**.

Self-Service Site Configuration Parameters for Guided Sourcing

Control How Full Sourcing Projects Are Opened for Category Buyer Users

When set to **Yes**, full projects only open in the guided sourcing user interface for **Category Buyer** users. The default value is **No**.

ID	`Application.AQS.NavigateToNewUI`
Name	**Control how full sourcing projects are opened for Category Buyer users**
Default value	**No**

Control how full sourcing projects are opened for Category Buyer users is set to the default value **No**, meaning that **Category Buyer** users can access and view full projects from the SAP Ariba Sourcing classic user interface.

> Note
>
> The behavior of projects created in guided sourcing remains unchanged, regardless of the value of the parameter.

If this parameter is set to **Yes**, full projects only open in the guided sourcing user interface, meaning that **Category Buyer** users can only access and view full projects created in the guided sourcing user interface.

Configuring this parameter only causes classic full projects to open in guided sourcing for members of the **Category Buyer** group.

For information about how to manage parameters, see the *Intelligent Configuration Manager administration* topics.

Related Information

Intelligent Configuration Manager Administration

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
Adding Items and Content to a Guided Sourcing Event from the Sourcing Library or Other Guided Sourcing Projects [page 324]

Smart import from Excel for guided sourcing events

Specifies if the smart import from Excel feature is supported for guided sourcing events.

ID	`Application.AQS.UnstructuredExcel.Import.Enabled`
Name	**Smart import from Excel for guided sourcing events**
Default value	**Yes**

Smart imports enable users to create events from Excel files that contain content in a format defined by your organization. When set to **Yes**, smart imports are supported. When set to **No**, smart imports aren't supported and Excel files must have a specific structure defined by SAP Ariba.

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
Using Smart Import from Excel To Create RFI or Auction Events in Guided Sourcing [page 100]
Importing Guided Sourcing Event Content Using the Smart Import from Excel Feature [page 311]
Creating RFP Events Using the Smart Import from Excel Feature [page 91]
Smart Importing Line Items Linked to Material Master [page 314]

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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