SAP Ariba

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Procurement Operations Desk for Sourcing Solutions

SAP Ariba Sourcing

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Content

Procurement Operations Desk for Sourcing Solutions

This guide is for SAP Ariba administrators and users who configure and use the procurement operations desk capability in SAP Ariba Sourcing.

The procurement operations desk capability in SAP Ariba Sourcing helps operational sourcing agents to manage their tasks associated with multiple sourcing projects and sourcing requests on a single dashboard view. Tasks associated with sourcing projects and sourcing requests in SAP Ariba Sourcing are routed to procurement operations desk and automatically assigned to the appropriate users.

Users assigned as procurement operations desk agents can view and organize their tasks on the procurement operations desk dashboard and open the tasks for further processing in SAP Ariba Sourcing. At any point, users designated as procurement operations desk managers can monitor the status of the tasks to take timely actions, such as assigning users for any unassigned tasks and viewing the status of the in-progress tasks to assess the state of the tasks and the task distribution of their teams.

Combined with SAP Ariba Sourcing, procurement operations desk offers the following features:

- Role-based dashboard views for operational sourcing users (procurement operations desk agents) and their managers (procurement operations desk managers) to perform actions they are allowed by their organization's policies
- Automatic allocation of tasks to the appropriate users based on their area of expertise to ensure completion of tasks within predefined turnaround times
- Display of alerts and warnings for users to prioritize their tasks to comply with defined service level agreements
- Ability to track the progress of tasks to focus on issues that require attention

This guide applies to:

- SAP Ariba Sourcing

Related Guides

Managing Projects, Teams, Documents, and Tasks

Prerequisites for Procurement Operations Desk for SAP Ariba Sourcing

The procurement operations desk capability is disabled by default. Once enabled, it requires a few configuration and administration steps before it's ready to use.

- To enable this feature, have your Designated Support Contact (DSC) submit a case. SAP Support will follow up to complete the case.
- Administrator users who perform the system settings tasks must be a member of the **Procurement Desk Administrator** group in SAP Ariba Sourcing.
- Depending on whether individual users or groups are assigned as owners of the tasks in a sourcing project, each task that needs to be routed from SAP Ariba Sourcing to procurement operations desk must fulfill the following conditions:
  - If a user is assigned as the owner, approver, or reviewer of a task, the user must also have membership of any of the following procurement operations desk groups:
    - **Procurement Desk Agent**
    - **Procurement Desk Manager**
    - **Procurement Desk Director**
  - If a group is assigned as the owner, approver, or reviewer of a task, at least one user in the group must have membership of any of the procurement operations desk groups for sourcing.
  - For tasks associated with requests originating from guided buying, the conditions listed above need to be fulfilled to ensure that the tasks are routed to procurement operations desk. This can be done by adding a user having membership of any of the procurement operations desk groups as an owner, approver, or reviewer of tasks (either individually or to a group) defined in the sourcing templates associated with forms in guided buying.

  In addition, procurement operations desk users must have membership of the appropriate groups and must be provided appropriate access controls to enable them to work on sourcing projects, sourcing requests, sourcing tasks, and the associated documents in SAP Ariba Sourcing.
- If you need to change your language and other preferences, make the required changes in SAP Ariba Sourcing.

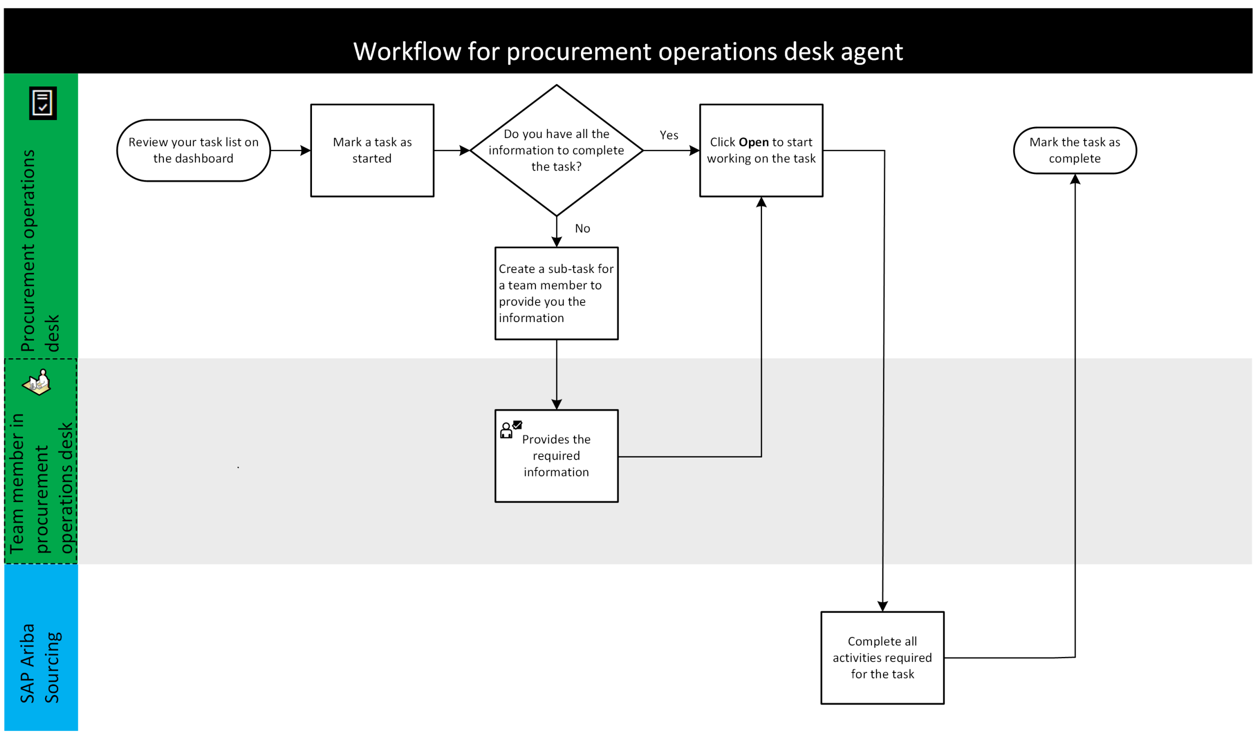
Related Information

Procurement Operations Desk Administration [page 19]

Workflow Overview

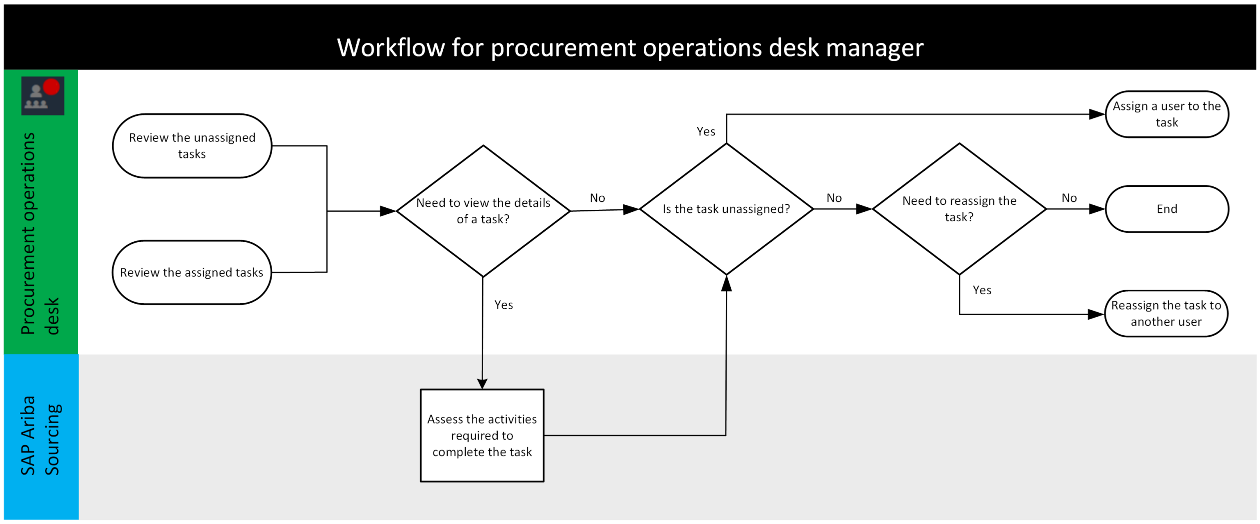
Workflow for Procurement Operations Desk Agent

The following diagram represents a high-level workflow of the activities performed by a procurement operations desk agent to complete a task:



Workflow for Procurement Operations Desk Manager

The following diagram represents a high-level workflow of the activities performed by a procurement operations desk manager:



User Tasks

Filtering and Sorting Projects and Tasks on Your Dashboard in Procurement Operations Desk

You can filter a list of projects or tasks on your dashboard by using one or more predefined filters and then sort the filtered list using a specific criterion.

Context

You can filter projects or tasks on your dashboard based on when they were received in procurement operations desk. For tasks, you can use the **Task type** filter to further filter the task list based on whether a task is mandatory, optional, or either of them.

Procedure

1. Perform the following steps to filter a set of projects on your dashboard:

a. Click the filter icon on the dashboard.
b. Under the **View** section, choose **By project** to display a list of projects.
c. Perform the following actions under the **Filters** section:
   - Choose the appropriate option for the **Received** filter to filter projects based on when the tasks associated with these projects were loaded to procurement operations desk.
   - Choose the appropriate option for the **Task type** filter to filter projects based on the type of tasks associated with those projects.

   The list of projects are filtered based on the filter criteria you applied.
d. To sort the list of projects on your dashboard, select the appropriate option from the **By:** dropdown.
   - SLA (time left): Sorts projects in the order of the minimum number of days remaining for completion of tasks in a project before the SLA dates are overdue.
   - Created date: Sorts projects in the descending order of dates when they were created.
   - Project due date: Sorts a list of projects based on the due dates assigned to them in procurement operations desk.

2. Perform the following steps to filter a set of tasks on your dashboard:
   a. Click the filter icon on the dashboard.
   b. Under the **View** section, choose **By task** to display view a list of tasks.
   c. Under the **Filters** section, choose the appropriate option for the **Received** filter to filter tasks based on when those tasks were loaded in procurement operations desk.
   d. To filter tasks based on their types (optional or mandatory tasks), under the **Filters** section, choose the appropriate option for the **Task type** filter.
   e. To sort the list of tasks on your dashboard, select the appropriate option from the **By:** dropdown.
      - Created date: Sorts tasks associated with projects in the descending order of dates when the projects were created.
      - SLA (time left): Sorts the task list in the order of the minimum number of days remaining for completion of the tasks before the SLA dates are overdue.

Viewing the Details of a Task in Procurement Operations Desk

You can view the details of a task in the **My tasks** view or the **Team tasks** view.

Procedure

1. Click on the appropriate project to display the associated tasks.
2. Click the more details icon in the row for the task you want to view and then click **View**.

   You are routed to the SAP Ariba Sourcing page.
3. After you review the details of the task, click the back arrow ← at the top of the page to return to your dashboard on procurement operations desk.

Assigning a Task to a User

You can assign a user to an unassigned task in the **Team tasks** view of the dashboard.

Context

In certain cases, tasks that do not match the criteria defined in the queue settings for task allocation fail to be assigned to the appropriate users. In such cases, you need to manually assign users to the unassigned tasks.

> ⓘ Note
>
> After you assign a task to a user in procurement operations desk, the corresponding task in SAP Ariba Sourcing also displays the user's name as the assigned user for the task.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click **Team tasks**.
2. Click on the appropriate project to view the associated tasks.
3. Click the more details icon ⠿ in the row for the task you want to assign to a user and then click **Assign**.

   The **Assign** page appears.
4. Search for the appropriate user based on the user's name or email ID and select the user from the search results.

   > ⓘ Note
   >
   > You can enter the first few characters of a user's name or email ID and perform a search to retrieve a list of users from which you can identify the appropriate user.
5. Click **OK**.

   The task moves from the **Unassigned** tab to the **Assigned** tab and appears as a new task on the dashboard of the assigned user.

Reassigning a Task to Yourself or Another User

Prerequisites

Users to whom tasks are reassigned must have membership of the appropriate groups to be able to perform the activities required to complete those tasks.

Context

You can reassign a new, in-progress, or an assigned task to yourself or another user. This action is useful in scenarios where the workload of users need to be balanced, or you need to manage the task distribution among users when organizational changes occur. When you reassign a task, it moves from the current user's task list to the reassigned user's task list.

While reassigning tasks, you can assign the tasks individually to the appropriate users. To reassign multiple tasks to the same user, you can choose the multi-select option on your dashboard to reassign multiple tasks to the new user in a single action.

> ⓘ Note
>
> After you reassign a task to a user in procurement operations desk, the corresponding task in SAP Ariba Sourcing also displays the user's name as the assigned user for the task.

Procedure

1. Perform the following actions to reassign a task to a user:
    a. Click the more details icon ⠿ for the task you want to reassign.
    b. To assign the task to yourself, click **Assign to myself**.

        The task moves under the **My tasks** view on your dashboard.
    c. To assign the task to another user, click **Reassign**.

        The **Reassign** view appears.
    d. Select the appropriate user and click **OK**.

        The task moves under the **My tasks** view on the user's dashboard.
2. Perform the following actions to perform mass reassigning of tasks to yourself or another user:
    a. Click the **Multiselect** checkbox on the dashboard.
    b. Select the tasks that need to be reassigned.
    c. To assign the tasks to yourself, click **Assign to myself** at the bottom of the page.

        The tasks move under the **My tasks** view on your dashboard.
    d. To reassign the tasks to another user, click **Reassign** at the bottom of the page.

        The **Reassign** view appears.
    e. Select the appropriate user and click **OK**.

        The tasks move under the **My tasks** view on the user's dashboard.

Marking a Task as Started in Procurement Operations Desk

When you start working on a task on your dashboard, the task moves from the **New** tab to the **In progress** tab. Further, the **Status** information for the task in SAP Ariba Sourcing is updated as **In progress**.

Procedure

1. From the menu options on the top left corner of the page, choose **My tasks**.
2. To mark a task as started and work on it later, on the **My tasks** view of the dashboard, click the more details icon ⠿ and then click **Start**.

   The task moves to the **In progress** tab on your dashboard.

Adding and Deleting File Attachments and Comments

You can include comments and attach documents to provide additional information required to help users process tasks associated with sourcing projects.

Prerequisites

- Your SAP Ariba Sourcing solution must be configured to support specifc file formats (Example: `pdf`, `jpeg`, or `png`) that are allowed be attached to sourcing projects and tasks.
- The maximum file size allowed is 10MB for an individual file and a total of 20MB when multiple files are uploaded.
- You must have the appropriate permissions to be able to delete attachments from sourcing projects and tasks. In addition, you can delete only those attachments that are added by users in procurement operations desk.

Context

Attachments can be added to both sourcing projects and tasks, while comments can be added only to sourcing tasks.

The attachments you add to tasks and projects in procurement operations desk are automatically uploaded to SAP Ariba Sourcing. Similarly, attachments added to projects and tasks in SAP Ariba Sourcing are visible in procurement operations desk. However, attachments added to sub-tasks (ad hoc tasks) are not uploaded to SAP Ariba Sourcing.

ⓘ Note

Notes added to sourcing tasks are not uploaded to SAP Ariba Sourcing.

Procedure

1. Do one of the following on your dashboard:
   - To attach a related document to a sourcing project, click the related documents icon in the row for the project.
   - To add an attachment to a task, expand a project to view its tasks and then click the attachment icon for the appropriate task.
2. To upload a file using the drag and drop functionality, perform the following steps:
   a. Click the **Drag files here or browse to upload files** label and navigate to the appropriate location on your system to select a file that needs to be attached.
   b. Drag the file to the **Attachments** screen.
3. To upload a file by browsing to the location of the file, perform the following steps:
   a. Click the **Drag files here or browse to upload files** label and navigate to the appropriate location on your system to select a file that needs to be attached.
   b. Complete the actions required to upload the file.
4. To delete an attachment, click the delete icon in the row for the appropriate attachment.
5. To download an attachment for a sourcing project, click the filename of the attachment on the **Attachments** screen.

   The document opens in SAP Ariba Sourcing. If required, click the back arrow ← at the top of the page to return to your dashboard on procurement operations desk.
6. To download an attachment for a task, click the filename of the attachment on the **Attachments** screen and complete the actions to save the file to a location on your system.
7. To add a comment to a task, click the comments icon for the task and do the following:
   a. Enter your comments in the **Comments** box and click **Add**.
   b. Close the **Comments** popup view to return to the dashboard.

      To delete a comment, click the comments icon for the item and click the delete icon in the row for the comment.
   c. Click ˟ to close the **Comments** page.

Approving or Denying an Approval Task in Procurement Operations Desk

Context

If you are an approver for an approval task, you can approve or deny it on your dashboard.

Procedure

1. On the **In progress** tab of the dashboard, click the more details icon ⠿ for the appropriate approval task.
2. If required, review the details of the task.
3. Click **Approve** or **Deny** to approve or deny the task.
   - The task moves from the **In progress** tab to the **Completed** tab.
   - Depending on the approval action, the task is flagged as **Approved** or **Denied** in SAP Ariba Sourcing.

Cancelling an Optional Task in Procurement Operations Desk

You can choose to cancel optional tasks to clear them from the task list in the **New** tab on your dashboard.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click **My tasks** and then click **New**.
2. Click the more details icon ⠿ for the task you want to cancel.
3. Click **Cancel**.
   - The task is cleared from the task list on your dashboard on procurement operations desk.
   - The **Completed** tab on the procurement operations desk dashboard indicates the canceled status for the task.
   - The task is flagged as **Cancelled** in SAP Ariba Sourcing.

Related Information

Reopening a Completed, Cancelled, or an Archived Task in Procurement Operations Desk [page 14]

Marking a Task as Complete in Procurement Operations Desk

After you finish all activities required to complete a task, you must mark the task as completed. When you mark a task as complete in procurement operations desk, the **Status** of the task in SAP Ariba Sourcing is also updated with the same status.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click **My tasks** and then click **In Progress**.
2. Click the more details icon ⠿ for the task you want to mark as complete.
3. Click **Complete**.

   The task moves from the **In Progress** tab to the **Completed** tab.

Reopening a Completed, Cancelled, or an Archived Task in Procurement Operations Desk

Context

You can reopen a completed, cancelled, or an old (archived) task to rework on it. When you reopen a task, the **Status** information of the task in SAP Ariba Sourcing is updated to indicate that the task is not started.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click **My tasks** and then click **Completed**.
2. Click the more details icon ⠿ for the task you want to cancel and click **Reopen**.

   The task moves under the **New** tab on your dashboard.
3. On the **New** tab, locate the task from your task list and perform the actions required to complete the task.
4. Mark the task as complete if you are done. For information about marking a task as complete, see Marking a Task as Complete in Procurement Operations Desk [page 14].

Creating a Sourcing Project or a Sourcing Request from Procurement Operations Desk

Prerequisites

You must have membership of the appropriate groups in SAP Ariba Sourcing to be able to create sourcing projects and sourcing requests. For more information about the groups who can create sourcing projects and sourcing requests, see the *SAP Ariba Strategic Sourcing and Supplier Management solutions group descriptions* guide.

Context

You can create a sourcing project or a sourcing request from the context of procurement operations desk. When you choose to create a sourcing project or a sourcing request, you are routed to the SAP Ariba Sourcing page where you can complete your tasks and then return to your dashboard on procurement operations desk.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click either **My tasks** or **Team tasks**.
2. Click **Create** and choose one of the following:
    - **New project**: to create a new sourcing project.
    - **New request**: to create a new sourcing request.

    You are routed to the SAP Ariba Sourcing page.
3. Complete the tasks required to create a sourcing project or a sourcing request.
4. Click the back arrow ← at the top of the page to return to your dashboard on procurement operations desk.

Specifying a Due Date for a Sourcing Project in Procurement Operations Desk

You can assign a due date for a new or an in-progress project to specify a target date by which all tasks for the project must be complete in procurement operations desk. Due dates can be used as a criterion to sort a list of projects in the order of priority by the approaching deadlines.

Prerequisites

You must be a procurement operations desk agent assigned with a task in a project to be able to manage the due date for that project. The actions you can perform to manage the due date for a project are:

- Specify a due date for a project
- View or change the due date added by you or another user associated with the project

> Note
>
> After you specify a due date for a project, you have the option to change it to another date in the future. However, you cannot delete a due date or change it to a past date. Further, due dates added to projects in procurement operations desk are not copied over to those projects in SAP Ariba Sourcing.

Procedure

1. On the dashboard, click the due date icon for a project and select the appropriate date.

   The due date is displayed in the row for the project.
2. To change the due date for a project, click the due date icon and select a different date on the calendar.
3. To delete a due date for a project, move the mouse pointer over the due date and click ˣ.

Marking a Project as Complete in Procurement Operations Desk

After you complete all mandatory tasks required to complete a project, you can mark the project as completed. When you mark a project as complete on procurement operations desk, the **Status** of the project in SAP Ariba Sourcing is also updated with the same status.

Procedure

1. Click the more details icon ⠿ for the appropriate project and then click **Complete**.

   If the project includes optional tasks that are not marked complete, a message appears stating that your action will cancel all optional tasks.
2. Perform one of the following actions:
   - Click **Submit** to cancel all optional tasks that are open and also close the project.
   - Click **Cancel** to cancel your action.

     > ⓘ Note
     >
     > You can choose to cancel an optional task or mark an optional task as complete before you close a project.

Related Information

Cancelling an Optional Task in Procurement Operations Desk [page 13]

Personalization of Homepage Preferences and Vacation Settings

Setting Up Default Homepage [page 18]

Turning on and Turning off Vacation Settings [page 18]

Setting Up Default Homepage

You can define your default page you want to view every time you sign in.

Procedure

1. Click the user profile icon ◯ on the top right corner of the page and then select **Homepage preferences**.
2. On the **Homepage preferences** view, select your default workspace as **Sourcing**.
3. Click **Next**.
4. Select your default landing page from one of the following options:
    - **My tasks**: Applicable if you are a procurement operations desk agent.
    - **Team tasks**: Applicable if you are a procurement operations desk manager.
5. Click **Next**.
6. Select your default dashboard tab from one of the following options:
    - **New**: Opens the **New** tab.
    - **In progress**: Opens the **In progress** tab.
    - **Completed**: Opens the **Completed** tab.
7. Click **Save**.

Turning on and Turning off Vacation Settings

You can turn on your vacation settings to ensure no tasks are assigned to you until you are back to work.

Procedure

1. Click the user icon ◯ and then select **Vacation mode**.
2. On the **Vacation mode** view, select **Vacation mode ON**, and click **Save** to turn on vacation mode.
3. To turn off your vacation settings, select **Vacation mode OFF** on the **Vacation mode** view, and click **Save**.

Procurement Operations Desk Administration

Administrators who are members of the **Procurement Desk Administrator** group can perform the configuration tasks on the **System settings** page on the procurement operations desk dashboard. The **System settings** page is the administration area on the dashboard for administrators to configure the settings required to enable users manage their tasks on procurement operations desk.

> ⓘ Note
>
> The configuration tasks in the **System settings** view can also be performed by members of the **Customer Administrator** group.

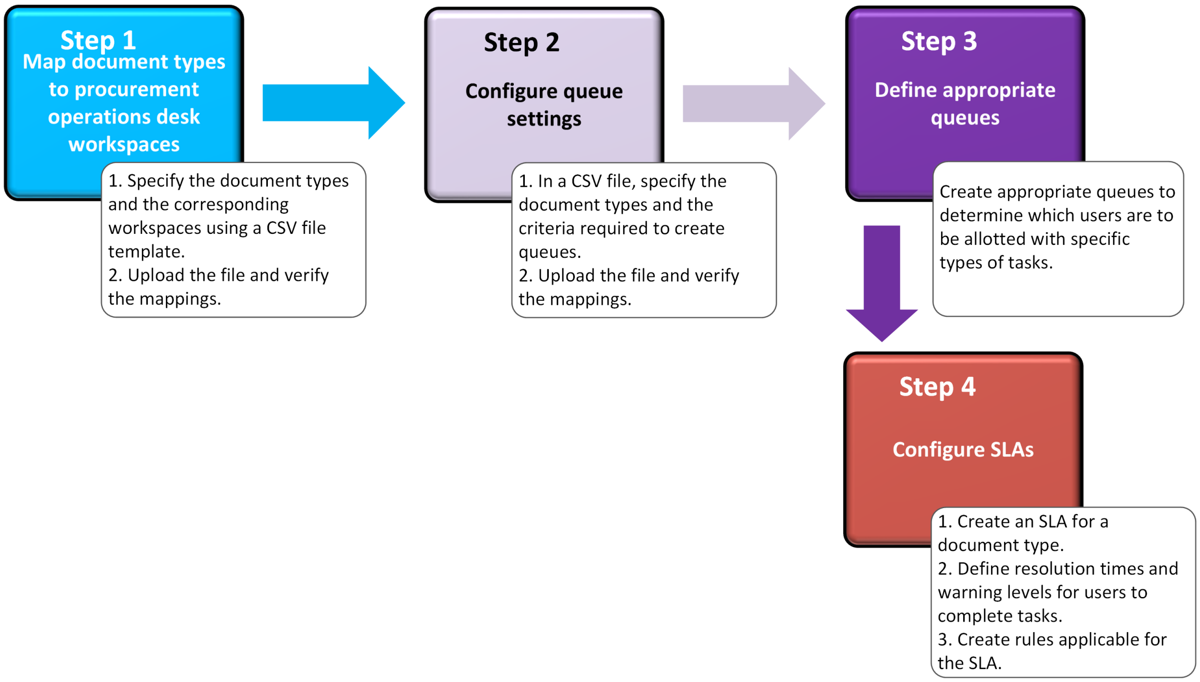
Related Information

Date to start loading tasks to procurement operations desk

Administrator Tasks

High-Level Overview of Configuration Tasks

The following figure provides a high-level overview of the administration tasks required to be performed on the **System settings** page on the procurement operations desk dashboard.



Related Information

High-Level Overview of Configuration Tasks [page 19]
Mapping Document Types to a Workspace [page 20]
Configuring Settings for Queues [page 21]
Queues [page 23]
Configuring SLA Settings for Sourcing Documents [page 28]

Mapping Document Types to a Workspace

Context

You must import the list of supported document types to a workspace in your site before you can create queues to assign tasks to users. Document types refer to documents associated with sourcing projects or sourcing requests.

Field name	Description
`WorkSpaceName`	The internal name assigned to a workspace.

Field name	Description
`DocumentType`	Refers to the document types that must be mapped to the workspace. The following is a list of document types that can be mapped to a workspace: • `SOURCINGPROJECT`: Sourcing project • `SOURCINGREQUEST`: Sourcing request

The following is a sample of a CSV file used to import the document types that must be mapped to the workspaces in your site:

```
UTF-8,
WorkSpaceName,DocumentType
SourcingWorkspace,SOURCINGPROJECT
SourcingWorkspace,SOURCINGREQUEST
```

Procedure

1. Click **System settings** and perform one of the following actions on the **System settings** page:
    - If you have configured the document type information, click **Choose file** in the **Workspace settings** area, and navigate to the appropriate location, and upload the CSV file.
    - If you require a sample file to upload the document type information, click **Download a sample file**, enter the document type information corresponding to the appropriate workspace, and then upload the file.
2. Click **See settings** to verify the changes.

Next Steps

If required, you can change the settings for the workspace by importing an updated CSV file.

Configuring Settings for Queues

A queue defines the conditions based on which a new task from SAP Ariba Sourcing is automatically queued in a user's task list.

Prerequisites

Ensure that you have mapped the procurement operations desk workspaces with the required document types.

Context

Perform this task to define the required attributes, such as commodity code, language, spend value, or geographical location necessary to define queues. You can select these attributes to specify the conditions based on which tasks associated with a document type are assigned to users.

You can specify the attributes required to create queues using a CSV file. The following table describes the fields in the CSV file used to define queue settings:

Field name	Description
`WorkSpaceName`	The internal name assigned to the workspace.
`DocumentType`	Refers to the predefined document types that must be mapped to the workspace. The following is a list of document types that can be mapped: • `SOURCINGPROJECT`: Sourcing project • `SOURCINGREQUEST`: Sourcing request
`FieldType`	Indicates the type of field, such as commodity code, money, or string. Valid values are `MoneyType`, `CommodityType`, and `StringType`.
`Status`	Indicates whether the queue is active or inactive. Valid values are `ACTIVE` and `INACTIVE`.
`PDDocumentType`	Refers to the predefined document types that are mapped to the workspace.

The following is a sample of a CSV that defines the attributes required to create queues for a document type:

```
UTF-8,,,,
Name,FieldName,FieldType,Status,PDDocumentType
Spend_Value,Price,MoneyType,ACTIVE,SOURCINGREQUEST
Category,CommodityCodes,CommodityType,ACTIVE,SOURCINGREQUEST
Location,Regions.name,StringType,ACTIVE,SOURCINGREQUEST
Language,Language.name,StringType,ACTIVE,SOURCINGREQUEST
Spend_Value,Price,MoneyType,ACTIVE,SOURCINGPROJECT
Category,CommodityCodes,CommodityType,ACTIVE,SOURCINGPROJECT
Location,Regions.name,StringType,ACTIVE,SOURCINGPROJECT
Language,Language.name,StringType,ACTIVE,SOURCINGPROJECT
```

Procedure

1. Click **System settings** and perform one of the following actions on the **System settings** page:
    - If you have defined the queue settings, click **Choose file** in the **Queue settings** tile, navigate to the appropriate location, and upload the CSV file.
    - If you require a sample file to upload the document type information, click **Download a sample file**, enter the document type information corresponding to the appropriate workspace, and then upload the file.

2. Click **See settings** to verify the changes.

Next Steps

If required, you can change the settings for the queues by importing an updated CSV file.

Queues

When you define a queue, you specify the attributes of a task based on which users added to the queue as owners are assigned to tasks that match the defined attributes. The attributes of a task include commodity code, language, spend value, geographical location, and other conditions you specify.

Tasks in SAP Ariba Sourcing are automatically updated with the names of users who are assigned as owners of those tasks in procurement operations desk.

When you work on queues, you can do the following:

- Define one or more queues for the initial setup
- Activate or deactivate a queue
- Change the users who are members of a queue
- Add or delete queues

You can create one or more queues on the **System Settings** page. To create multiple queues, you have the option to define queue information in an Excel file and upload the file on the **System Settings** page.

Defining Queues on the System Settings Page [page 23]

Creating Multiple Queues Using Excel File Upload [page 25]

Exporting Queues in an Excel File [page 27]

Related Information

Configuring Settings for Queues [page 21]
Defining Queues on the System Settings Page [page 23]
Creating Multiple Queues Using Excel File Upload [page 25]

Defining Queues on the System Settings Page

Prerequisites

Ensure that you have configured the queue settings for your site. For more information, see Configuring Settings for Queues [page 21].

Procedure

1. On the **System settings** page, click **Manage queues** in the **Queue management** area and then click **Add** › **Create queue**.
2. On the **New queue** page, select one of the following, as appropriate:
    - Sourcing project
    - Sourcing request
    - (Request for quotation) RFQ
    - (Request for information) RFI
    - (Request for proposal) RFP
3. Enter a name for the queue and add a description.
4. In the **Queue manager** dropdown, search for the appropriate user and add the user as a queue manager (procurement operations desk manager).

    > **Note**
    >
    > By default, the owner associated with the originating document type is assigned as the queue manager.

5. Enter a priority value.

    If two queues have similar attributes, the priority value determines which task is assigned to a queue. A queue with the lowest numerical value has the highest priority.
6. In the **Rules** section, click **Add rule** to add one or more rules. For more information about specifying the rule conditions, see Rules for Defining Queues [page 30].
7. In the **Assign queue** section, choose one of the following in the **Assign type** dropdown to specify how a user (procurement operations desk agent) must be assigned to the tasks arriving in a queue:
    - **Assign to member**: Specify a user as the primary owner of the queue. If required, add a secondary owner who can take over the tasks in the absence of the primary owner. If both primary and secondary users are on vacation, all incoming tasks are assigned to the queue manager specified in the **Queue manager** field.
    - **Balance workload**: Specify a set of users as members of the queue to ensure that tasks are allotted evenly to balance the workload among them. After you specify the users, the details of the users are displayed in the **Add members** list. This method considers a user's workload from tasks allotted from other queues in which the user is a member. In this setup, users who have turned on their vacation settings are not considered for task allocation. In a scenario where all members turn on their vacation settings, all incoming tasks are assigned to the queue manager.
    - **Assign to owner**: Assigns the task to the user associated with the sourcing project or sourcing request in SAP Ariba Sourcing.
    - **Round robin**: In this arrangement, the workload of users is not considered when tasks are assigned. Instead, tasks are assigned to the users on a rotational basis where each user is assigned a task once in an assignment cycle. For example, if there are three users in a queue, tasks are allotted as follows:
        - Task 1 goes to the first user
        - Task 2 goes to the second user
        - Task 3 goes to the third user
        - Task 4 goes to the first user
        - ... and so on

8. If you specified **Assign to member** in the **Assign type** field, specify a primary and a secondary user to whom tasks must be assigned.
9. Click **Save** and use the slider on the top right corner of the page to change the status of the queue to **Active**.
10. On the **System settings** page, click **Refresh** in the **Refresh queues** area to refresh the settings you made for the queues.

Creating Multiple Queues Using Excel File Upload

Prerequisites

- Ensure that you have configured the queue settings for your site. For more information, see Configuring Settings for Queues [page 21].
- The maximum size of the file you need to upload must not be greater than 10MB.
- Excel files only with file extension `.xlsx` are supported.

Procedure

1. On the **System settings** page, click **Manage queues** in the **Queue management** area and then click **Add** > **Upload queues**.
2. Perform one of the following actions on the **Upload multiple queues** window:
   - If you have already configured the details of queues in an Excel file, drag and drop the file. Alternatively, click the **browse** link, navigate to the appropriate location on your system, and upload the file.
   - If you require a sample file to upload information about queues, click **Download a sample file**. Specify the required information corresponding to the appropriate queue in the Excel file, and then upload the file. The Excel file has three tabs in which you define header-level information about the queues, configure queue rules, and assign users to the queues. The following table describes the fields in the Excel file:

Field	Description
Fields in the `QueueHeader` tab	
`QueueName`	Enter a unique name for the queue.
`Description`	Provide a description for the queue.
`OwnerId`	Add the ID of the appropriate user as the queue owner.
`OwnerPasswordAdapter`	The name of the password adapter for the user specified in the `OwnerId` field.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td><code>Priority</code></td><td>Enter a priority value.

If two queues have similar attributes, the priority value determines which queue is assigned to a task. A queue with the lowest numerical value has the highest priority.</td></tr>
<tr><td><code>DocTypes</code></td><td>Specify the appropriate value for the <code>DocumentType</code> defined for your workspace. For more information, see Mapping Document Types to a Workspace [page 20].</td></tr>
<tr><td><code>AssignStrategy</code></td><td>Specify how a user (procurement operations desk agent) must be assigned to the tasks arriving in a queue. The following are the options you can specify:
<code>PRIMARY_SECONDARY</code>: Indicates whether a queue is assigned to primary and secondary owners. This option corresponds to the Assign to a member option while configuring queues on the System Settings user interface.
<code>LOAD_BALANCE</code>: Specifies whether a set of users are assigned as members of a queue to ensure that tasks are allotted to them on a round-robin basis to balance the workload among them. This option corresponds to the Balance workload option while configuring queues on the System Settings user interface.
<code>ASSIGN_TO_OWNER</code>: Specifies whether tasks in the queue must be assigned to the user associated with the sourcing project or sourcing request in SAP Ariba Sourcing.</td></tr>
<tr><td colspan="2">Fields in the <code>QueueRules</code> tab</td></tr>
<tr><td><code>QueueName</code></td><td>Unique name assigned to the queue.</td></tr>
<tr><td><code>LHS</code></td><td>Specify an attribute, such as <code>Price</code>, <code>CommodityCodes</code>, or <code>Regions</code> based on which you need to build conditions to create a rule.</td></tr>
<tr><td><code>Operator</code></td><td>Select an operator, such as <, >, or = to define the condition.</td></tr>
<tr><td><code>RHS</code></td><td>Depending on the attribute specified in the LHS column, specify an appropriate value, (for example, <code>1000USD</code>, <code>France</code>, or <code>English</code>) based on which you need to create a rule.</td></tr>
<tr><td><code>LogicalOperator</code></td><td>Use the operators || and && to define OR and AND conditions.</td></tr>
</table>

Field	Description
Fields in the `QueueUsers` tab	
`QueueName`	Unique name assigned to the queue.
`UserId`	User ID of the user to whom tasks in a queue must be assigned. If you choose to configure a queue based on primary and secondary users, specify two users for the queue. The first occurrence of a user ID for a queue is considered as the primary user and the next user ID is considered as the secondary user. For queues in which tasks need to be assigned to the owners of those tasks, do not specify a value. You can specify multiple users for a queue if you prefer tasks to be allotted on a round-robin basis to balance the workload among them.
`PasswordAdapter`	The name of the password adapter for the user specified in the `UserId` field.

3. Use the slider on the top right corner of the page to change the status of a queue to **Active**.
4. On the **System settings** page, click **Refresh** in the **Refresh queues** area to refresh the settings you made for the queues.

Next Steps

If required, you can change the settings for a queue by editing the details of the queue on the **System Settings** page or by importing an updated Excel file.

Exporting Queues in an Excel File

You can download queues defined in procurement operations desk in an Excel file. Exporting queues is an alternative method of creating a template that assures the spreadsheet is correctly formatted if you want to make changes to existing queues or create new queues through Excel import.

Procedure

1. From the menu options on the top left corner of the page, select **System settings**.

2. On the **System settings** page, click **Manage queues** in the **Queue management** area.
3. Click **Export**.
4. Complete the actions required to save the Excel file on your system.

Configuring SLA Settings for Sourcing Documents

A service level agreement (SLA) defines the maximum turnaround time available for a user to complete a task.

Context

When you create an SLA, you can do the following:

- Assign an SLA for processing sourcing projects or requests.
- Define the response time available for users to review and complete a task.

  > Note
  >
  > Procurement operations desk considers only the workweek starting from Monday through Friday to determine the response time for SLAs. Weekends are ignored.
- Configure warnings to be displayed on the dashboard to alert users about the time remaining to complete a task.
- Define additional rules based on which an SLA must apply.

Procedure

1. On the horizontal navigation bar at the top of the dashboard, click **System settings**.
2. On the **System settings** page, click **Manage SLA settings** in the **Service Level Agreements (SLAs)** area, and then click **New**.

   The **Configure Service Level Agreement** page appears.
3. Select the appropriate options from the following:
   - **Sourcing project**
   - **Sourcing request**
4. Enter a name and a description for the SLA.
5. Enter a numeric value (for example, `1`) to specify the **Priority**. For a document type associated with multiple SLAs, a priority with the highest number determines which SLA applies first.
6. Enter a numeric value (for example, 10) to configure the **Number of days to resolve**. To calculate the date by which the sourcing document must be processed, this value is added to the date the document was received in procurement operations desk.
7. Enter a numeric value for **Show warning (percentage)**. Based on this value, a warning is displayed to alert users of the percentage of time remaining to process a sourcing document. For example, if you set a resolution

duration as 10 days and a warning percentage as 20, a warning displays on the dashboard on the eighth day after the date the document was received in procurement operations desk.

8. If required, click **Add rule** to create a rule based on which the SLA needs to be triggered. For more information about specifying the rule conditions, see Rules for Defining Queues [page 30].
9. Click **Save** to save your settings.
10. To activate the SLA, use the slider on the top-right corner of the page to change the status of the SLA to **Active**.
11. To edit an SLA, complete the following steps:
    a. On the **System settings** page, click **Manage SLA settings** in the **Service Level Agreements (SLAs)** area.
    b. Click the edit icon for the required SLA and make the necessary changes.
    c. Click **Save** to save your settings and then use the slider on the top-right corner of the page to change the status of the SLA to **Active**.

Managing Unprocessed Tasks

Context

The **Unprocessed Tasks** page lists tasks that have not been assigned to the appropriate queues. Usually, this list appears when a large number of tasks are loaded from SAP Ariba Sourcing to procurement operations desk. In normal cases, this list is displayed for a brief period and clears automatically. However, in some cases, this list does not clear mainly because of internal processing issues. You can use the **Refresh** option to restart the process to clear the unprocessed task list to ensure that those tasks move under the appropriate queues.

Procedure

1. On the **System settings** page, click **Manage unprocessed tasks** in the **Unprocessed items** area.

   The **Unprocessed Tasks** page appears and includes a list of any unprocessed tasks.
2. Click **Refresh**.
   - The list of unprocessed tasks is cleared.
   - The tasks move into the appropriate queues and are assigned to the appropriate users.

Viewing Audit Trail of Events

Context

You have the option to review the history of actions performed by users by downloading a report of events in a CSV file. When you download a report, you need to specify a date range and then select a category to indicate the area within which you want to view the report. For example, you might want to view a report of user actions related to managing queues within a certain date range. Similarly, you might want to download a combined report of user actions related to managing queues and tasks during a specific period.

Procedure

1. On the **System settings** page, click **Download audit events** in the **Audit events** area.

   The **Download audit events** page appears.
2. Select the dates between which you want to view the events.
3. Under the **Select entity** section, select one or more categories for which you want to view the report.

   To create a report based on all categories, select **All**.
4. Click **Download** and specify an appropriate location on your system to save the file.

   The CSV file consisting of the report is included in a zip file.

   The following information is included in the report:
   - Category: Indicates the area for which the report is created. For example, `SLA` indicates that an event is related to the SLA settings configured for your site.
   - Entity: Refers to the specific entity within a category to which the event is related. For example, if there are three queues namely `queue 1`, `queue 2`, and `queue 3`, the category is `Queue` and `queue 1` can be an entity within the queue category.
   - Event: A unique identifier for the event type.
   - Audited User: Refers to the user who performed the action.
   - Date: Indicates the date when an action was taken or an event occurred.
   - Message: Provides a description of the event.

Information for Administrators

Rules for Defining Queues

You have the option to add rules when you create a queue. Rules provide additional criteria to determine which tasks are allocated to a user or to a group of users specified as owners of the queue.

When you define a rule, you use the attributes of a task (for example, commodity code or location) to build conditions that must be fulfilled for a task to be added to a queue. The conditions are defined using the following operators:

Operator	Description
=	Specifies that an attribute must match a given value
<	Specifies that an attribute must be less than a given value
!=	Specifies that an attribute is not equal to a given value
>	Specifies that an attribute must be greater than a given value

Operator	Description
<=	Specifies that an attribute must be less than or equal to a given value
>=	Specifies that an attribute must be greater than or equal to a given value

Examples

- Condition: If all tasks associated with suppliers based in London must be assigned to “User A”.
  Create a queue to specify the queue owner as “User A” and add a rule under the **Rules** section as follows:
  `Location = London`
- Condition: All tasks having a spend value up to $1000 must be assigned to "User B". This is applicable only if the suppliers are in New York.
  Create a queue to specify the queue owner as “User B” and add a following rule to fulfill these conditions:
  `SpendValue ≤ $1000`
  `Location = New York`

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