Ariba Sourcing & Contract Request Guide

Version: 1.7
Date: March 2020
Author: Seonaid Jamieson

Table of Contents

Introduction 1
Purpose of Guide 1
Sourcing Requests and Contract Requests 1
Sourcing Request 2
What is a Sourcing Request? 2
When is a Sourcing Request Required? 2
Creating a Sourcing Request (SR) 3
Supporting Documents 5
Uploading Supporting Documents 6
Submitting a Sourcing Request 6
Approved Sourcing Request 7
Denied Sourcing Request 7
Contract Request 8
What is a Contract Request? 8
When is a Contract Request Required? 8
Creating a Contract Request (CRW) as a Follow-on from a Contract Workspace (CW) 8
Completing the CRW Overview Form 9
Supporting Documents 11
Uploading Supporting Documents 11
Submitting a Contract Request 12
Approved Contract Request 12
Denied Contract Request 13
Multilevel Dropdown Fields 14
Using Keywords 14
Drilling Down 14
Replacing Documents 16
Version History 16

Document Information

Revision History

Date	Version	Author/Editor	Requestor	Description
July 10, 2019	1.0	Seonaid Jamieson	Erin Poorooshasb	Revised SR & CR Guide
September 4, 2019	1.1	Seonaid Jamieson	Erin Poorooshasb	Addition of new field (Approval Authorizations)
September 10, 2019	1.2	Seonaid Jamieson	Kirby Myers	New screenshot and addition of NSHA exemption for above field.
November 13, 2019	1.3	Seonaid Jamieson	Kirby Myers	Removal of 'Proposed Contract Value' field; New screenshot and wording of Funding Authorization field.
December 2, 2019	1.4	Seonaid Jamieson	Kirby Myers	Addition of *Quick Reference Checklists* at beginning of document.
December 18, 2019	1.5	Seonaid Jamieson	Kirby Myers	Removal of the process to create a stand-alone CRW.
February 19, 2020	1.6	Seonaid Jamieson	Kamia Creelman	New/updated fields including temporary removal of 'Funding Authorizations' field.
March 10, 2020	1.7	Seonaid Jamieson	SAP Ariba	Re-introduction of the 'Funding Authorizations' field; updated Quick Reference sheets.

Quick Reference Checklist: Sourcing Request

Step One: Create New Sourcing Request

- Click **Create** from the top right-hand corner;
- Select **Sourcing Request**.

Step Two: Complete New Sourcing Request Fields

- Insert Title in **Name** field: The title should identify the Good or Service being sought. Do **NOT** use the name of a vendor or previous contract;
- Insert a Description in the **Description** field, including the following:
  - ✓ Brief description of what is required/requested;
  - ✓ Identify if the expectation is an ALTP or Tender (RFX) (NOTE: Following a review of the information provided the strategy may change);
  - ✓ Previous tender number or Contract Workspace # (if applicable);
  - ✓ Previous vendor who held this contract (if applicable);
  - ✓ Previous Contracts, Purchase Order or Outline Agreement number (if applicable);
- Leave **Copy from Project** as **(no value)**;
- Leave **Project State** as **Active**;
- Leave **Test Project** as **No**;
- Select your **Division / Department / Region**: Select your entity/department. **DO NOT SELECT THE PARENT CATEGORY** - even if the goal is to obtain a province-wide contract;
- Select **Project Reason** from the dropdown – **DO NOT** leave as **No choice**;
- Insert the Estimated value in the **Initial Contract Period** field (**DO NOT** include Renewal values);
- Select the appropriate **Procurement Type**. Be specific – take the time to choose the **RIGHT** category as this determines the routing of your SR to the appropriate team within Procurement;
- Enter your entity's unique **Project #** (if applicable). This is used by specific departments to track internal Project or Order numbers to the SR;
- Enter the name, phone number and email of SME in the **Who is the Subject Matter Expert for Procurement to Contact?** field. This individual is the person in your organization who is best suited to discuss requirements;
- Leave the **Complexity** field as is. This is for Procurement only;
- **Select All Funding Authorizations that Apply** – Only appears when 100 series Dept. selected. ALL PNS clients must complete;
- Click **Create** at the top or bottom right-hand side.

Step Three: Upload Documents to the Sourcing Request & Submit

- Click on the **Documents** tab of the Sourcing Request;
- Click **Actions** at the top right of screen;
- Under **Upload** select **Documents**;
- Select **Browse** or **Choose File** and locate the document you wish to upload (or drag and drop);
- In the **Description** field, enter a short description of what is contained in the document being uploaded;
- Leave **Announce the creation of this new document** and **Unzip contents to project** boxes unchecked;
- Click **Create** at the bottom-right of the screen;
- Click the **Tasks** tab;
- Click the arrow next to the **Submit** task name and select **View Task Details**;
- **Do not alter # 1** and **# 2** on this screen;
- You may insert additional information in the **Provide an initial message and click Submit** box. Note however, this will be viewed by the approver, not by the Specialist who is later assigned;
- Click **Submit**. Under the **Tasks** tab, confirm the status indicates **In Approval**. If it says **Not Started**, you have NOT sent the SR to Procurement and they will not receive any notification.

Quick Reference Checklist: Contract Request as a Follow-on

Step One: Locate and Open the Contract Workspace for the Contract

By creating your Contract Request from the Contract Workspace (CW), much of the detail will be completed.

- Locate and open the Contract Workspace;
- Click the arrow next to **Actions** and select **Follow-on Project**;
- Select **Contract Request (Procurement)**;
- If you are unsure how to locate the CW, contact Procurement for assistance.

Step Two: Complete New Contract Request Fields

- Insert Title in **Name** field: The title should identify the Good or Service being sought. Do **NOT** use the name of a vendor or previous contract.
- A **Description** should be carried forward from your Workspace. However, add additional details including the following:
  - ✓ Brief description of what is required/requested in your amendment, for example: '*Amendment required to renew contract for an additional option year and add additional funds*';
- Leave **Test Project** as **No**;
- In the **Contract Amount** field, enter the full value of the initial term of the contract (e.g. 3 years at $100.000 per year is $300,000);
- Leave **Copy all documents from the parent project?** as **No**;
- Leave **Copy all groups from the parent project?** as **No**;
- Confirm the other fields are accurate;
- Check **Select All Funding Authorizations that Apply** is correctly populated from CW if applicable (PNS clients) – only available when 100 series Dept. selected;
- After the fields are completed and as detailed as possible, click **Create** at the top or bottom right-hand side.

Step Three: Upload Supporting Documents to the Contract Request & Submit

- Click on the **Documents** tab of the Contract Request;
- Click **Actions** at the top right of screen;
- Under **Upload** select **Documents**;
- Select **Browse** or **Choose File** and locate the document you wish to upload (or drag and drop);
- In the **Description** field, enter a short description of what is contained in the document being uploaded;
- Leave **Announce the creation of this new document** and **Unzip contents to project** boxes unchecked;
- Click **Create** at the bottom-right of the screen;
- Repeat steps to upload each document. Documents should **NOT** be uploaded in one large PDF file. Each document should be uploaded separately;
- Click the **Tasks** tab;
- Click the arrow next to the **Submit** task name and select **View Task Details**;
- **Do not alter # 1** and **# 2** on this screen;
- You may insert additional information in the **Provide an initial message and click Submit** box. Note however, this will be viewed by the Approver, not by the Specialist who is later assigned;
- Click **Submit**. Under the **Tasks** tab, confirm the status indicates **In Approval**. If it says **Not Started**, you have NOT sent the CRW to Procurement and they will not receive any notification.

Introduction

Ariba is the Province's leading eProcurement tool which is made up of three distinct modules – Sourcing (buying), Contracts (to ensure all documents are stored) and Spend Analysis (spend data for each contract we currently have in place).

Purpose of Guide

The purpose of this Guide is to outline the procedure of creating and submitting Sourcing and Contract Requests, including when and when not to submit one, and how to deal with denied Requests.

Sourcing Requests and Contract Requests

Sourcing and Contract Requests are completed with three easy steps:

1. Creation - complete the Sourcing or Contract Request;
2. Upload supporting documents;
3. Submit the Request.

The first step is to determine whether you must complete a Sourcing Request or a Contract Request.

- To determine whether a Sourcing Request is required – **CLICK HERE, review the content and follow the steps provided**.
- To determine whether a Contract Request is required – **CLICK HERE, review the content and follow the steps provided.**

Sourcing Request

What is a Sourcing Request?

A Sourcing Request (SR) is a key intake tool for Procurement to begin any new procurement project (Tender (RFX), ALTP, etc.). Complete and detailed information provided by you (our client) with this initial request is critical for Procurement to assess and action the request. Insufficient detail could lead to a Sourcing Request being denied and returned for additional information.

When is a Sourcing Request Required?

A Sourcing Request (SR) is required for procurements *Over Threshold* as defined by the Trade Agreements and the Nova Scotia Procurement Policy (see Table 1). This includes when a new purchase/contract is required, or a previous contract has or is about to expire.

DO submit a Sourcing Request **IF**

- it is a new or unique purchase **over threshold (see Table 1 below)**, excluding taxes.
- a previous contract for the good, service, or construction (and any options to extend) has expired or is about to expire.

DO NOT submit a Sourcing Request **IF**

- there is an existing **contract** or **Standing Offer** already in place for the good, service, or construction.
- there is a **permanent exemption** in place for the good, service, or construction, such as the exemption for emergency services or confidential legal services.

Table 1

Provincial Department, Office or Agency	Nova Scotia Health Authority
Tenders (RFX) for Goods, Services and Construction over $10,000	**All** Goods over $25,000
ALTPs for Goods over $10,000	**All** Services over $50,000
ALTPs for Services over $50,000	**All** Construction over $100,000
ALTPs for Construction over $100,000	

NOTE: If you are extending an existing contract or standing offer, please see Creating a Contract Request page 8.

Creating a Sourcing Request (SR)

The diagram below shows the Workflow process for a Sourcing Request.

The two most common ways to create a Sourcing Request from the Ariba Dashboard, are outlined below.

- At the top left under **Common Actions**, select **Create** ➢ **Sourcing Request** (Figure 1).
- At the top right, select the ▼ symbol beside **Create** to expand the menu, then select **Sourcing Request** (Figure 2).

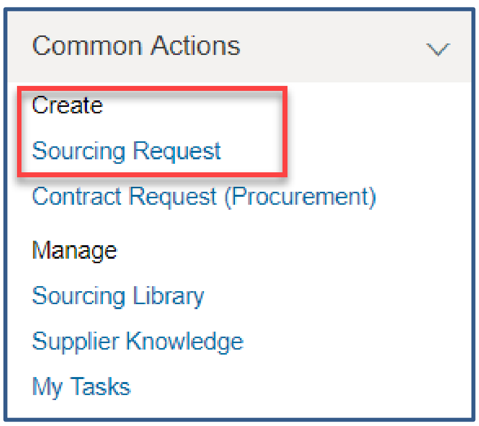

Figure 1

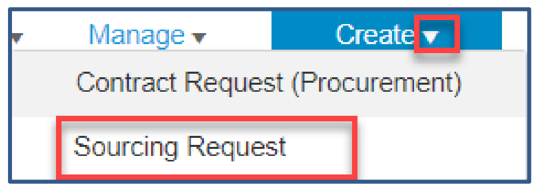

Figure 2

The **Create Sourcing Request** screen appears.

1. Complete the following fields, **leaving others 'as is' unless otherwise required**. Mandatory fields are marked with an asterisk (*).

Label	Description
Name:*	Explain in a few words what you are looking for (for example, *Two new trucks for Lands & Forestry*). Do **NOT** use the name of the vendor or previous contract. The title should identify the Good or Service being sought.
Description:	Insert description including the following: ✓ Brief description of what is required/requested ✓ If applicable, identify if the expectation is an ALTP or Tender (RFX) ✓ Previous tender number or Contract Workspace # (if applicable) ✓ Previous vendor who held this contract (if applicable) ✓ Previous Contracts, Purchase Order or Outline Agreement # (if applicable)
Copy from Project:	Leave as is (no value).
Project State:	Default is **Active**. Leave as is.
Test Project:*	Default is **No**. Leave as is.
Base Language:	Default is **English**; the other option is **French**.

Label	Description
Division/ Dept. / Region:*	Use keywords or the arrows to filter down to your specific entity (see Multilevel Dropdown Fields on page 14 for more information) – **DO NOT** select the parent categories such as the Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards. If request is for a Province-wide contract, choose all that are applicable.
Project Reason:	Select the reason for the project from the dropdown options. **DO NOT** leave as **No Choice**.
Initial Contract Spend:*	Enter the estimated amount of the procurement value. Do not include renewal values.
Predecessor Project:	**Important:** Leave this field as (no value).
Procurement Type:*	Choose from the list. This selection will decide which procurement group (goods, services, clinical or construction) the request is assigned to. **NOTE: If this selection is not correct, delays can occur.** For example, the Construction group cannot approve Clinical or Goods & Services and vice versa. **Be Specific**. Take your time to choose the **CORRECT** category as this determines the routing of your SR to the appropriate team within Procurement (e.g. Clinical Equipment Maintenance/Service, choose the respective CLINICAL Procurement Type). If unsure, click the info ⓘ button for examples.
Project #: (Optional)	Enter your entity's unique tracking number here (if applicable). This is used by specific departments to track internal Project or Order numbers to the SR.
PNS SAP Req. #:	Enter purchase requisition number if known.
Who is the Subject Matter Expert to Contact?:*	Enter the name, phone number and email of SME for Procurement to contact. This individual is the person in your organization who is currently best suited to discuss requirements. This field is now mandatory.
Funding Authorization Required?*	**This field only appears when a 100 series (PNS) Division/Dept is selected**, and is mandatory – choices are **Yes** or **N/A**. Select **Yes** if applicable – at least one of the following options should be selected: A Report and Recommendation (**R&R**); Tangible Capital Assets (**TCA**); Ministerial Approval (**MA**); A Professional Services Directive Request (**PSR**); A Memorandum to Executive Council (**MEC**). See Figure 3 below.
Complexity (for Procurement use only):	Leave as is (**No Choice**). This field is for Procurement staff only.
Is this a Redevelopment project?:*	New mandatory field used to track the amount of work flowing through Procurement from Healthcare Redevelopment. Select **Yes** or **NO**.
Owner:	Defaulted from system with user name.
Currency:	Defaulted from system with current currency.

NOTE:

- Clicking the info ⓘ symbol provides a brief overview of each selection type.
- At the end of the info commentary is some blue text. This is a hyperlink to related Treasury Board information.

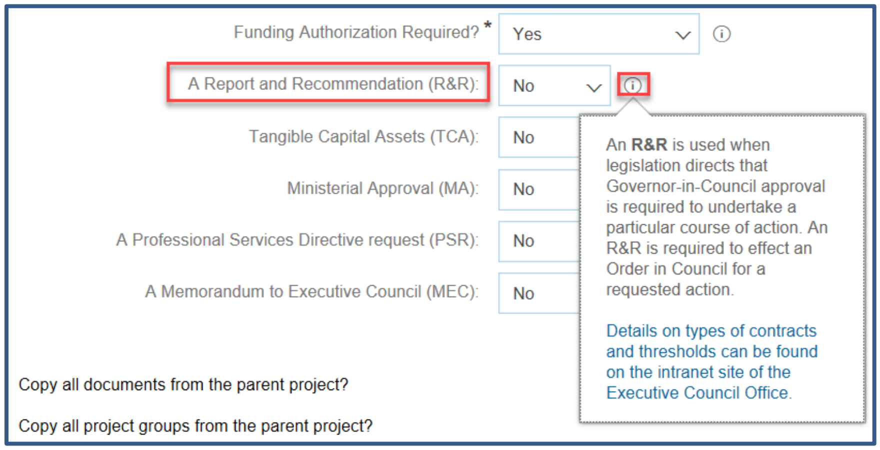

Figure 3

2. Click **Create**. This takes you to the Overview form on the Sourcing Request homepage.

NOTE:

The Sourcing Request (SR) ID number appears on the Overview form and in the top-right of the screen and **Sourcing Request** is shown below the name of the SR (Figure 4).

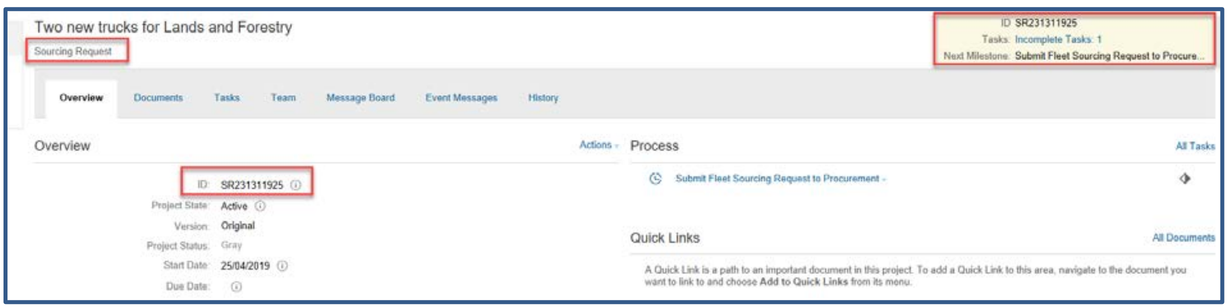

Figure 4

Supporting Documents

In addition to the fields indicated in the steps above, supporting documents are required to complete the request. These documents may vary from project to project. The purpose is to provide some examples and context for the next phase of the procurement. Think of this support as functional, not prescriptive. Procurement needs to know what ***you*** need. There is no definitive checklist; if it adds perspective, include it.

Under the **Documents** Tab, upload a copy (SEPARATELY) of any of the following that are applicable (instructions on uploading are provided below):

- ✓ Copy of previous tender document and addendum documents (or one from another jurisdiction)
- ✓ Copy of previous contract and amendments
- ✓ Market Research (if available)
- ✓ Specifications (if available)
- ✓ SOW – Statement of Work

If this is request for an ALTP, please ensure the following documents are included:

- ✓ Signed ALTP (If support already received from Procurement)

- ✓ Contract to accompany ALTP (If the contract has already been signed, you must include with your request)
- ✓ SOW - Statement of Work
- ✓ Quote(s)

Uploading Supporting Documents

1. Navigate to the **Documents** tab.
2. Click the **Actions** button to expand menu.
3. Under **Upload**, select **Document**.

The **Create Document** screen appears.

4. **Upload file:** Click the **Browse** or **Choose File** button to locate the file to upload. You can also **drag and drop** the file into the box. File names should reflect the content (*e.g. Truck Specs*) and be uploaded one at a time, not grouped into one large file.
5. **Description:** Leave blank or enter a short description of what is contained in the document being uploaded.
6. Click **Create** ➢ **Done**.

Repeat steps 2-6 above to add more documents as required. In the screenshot below (Figure 5), the following files have been added – an Excel Workbook; a Word document; a JPG image and a PDF file. Clicking on each file will give the option to **Download Draft**, **Copy**, **Move** or **Delete** and **Publish**.

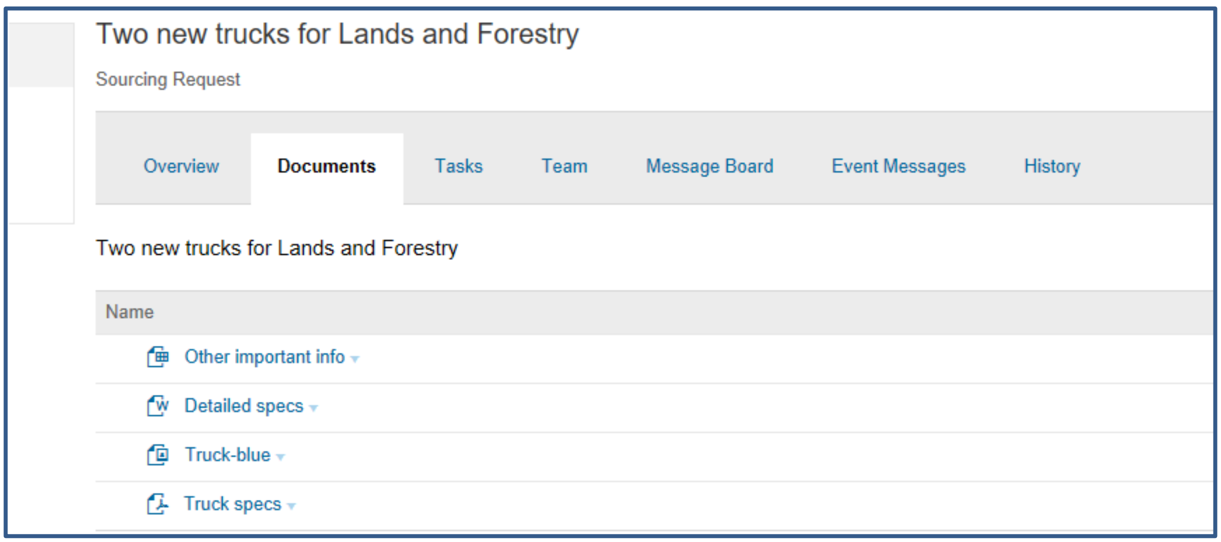

Figure 5

If you inadvertently uploaded the incorrect file, it can be replaced. Follow the instructions in Replacing Documents page 16 to do this.

Submitting a Sourcing Request

Once all the supporting documents have been uploaded and the details thoroughly checked, the Sourcing Request can be submitted to Procurement.

Be sure to double-check all the information you have entered is correct and relevant and check all the required documents have been added. If you need to replace any documents, follow the steps in the Replacing Documents section on page 16. Once you are certain all necessary information has been added, follow the steps below to submit the request.

1. Navigate to the **Tasks** tab.
2. Click the one task and under **Action** select **View Task Details**. The Approval Task screen is displayed (Figure 6).
3. Steps 1 and 2 require no action.
4. Step 3: Optional – if required, enter a brief description. Note however, that this will be viewed by the Approver and not the Specialist to whom it is later assigned.
5. Do **NOT** add attachments to the task as they may be missed. Documents are uploaded via the Documents tab.
6. Step 4: Click **Submit**.

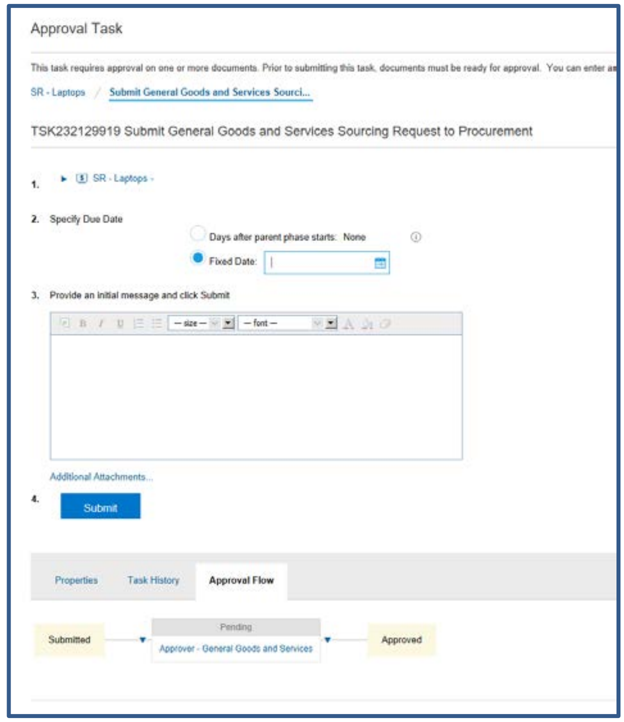

Figure 6

Once the Request has been submitted, the status under the **Tasks** tab changes from **Not Started** to **In Approval**.

Approved Sourcing Request

When a Sourcing Request is approved, an email notification is sent to you and under the **Tasks** tab, the line item status changes from **In Approval** to **Approved** and there is a green checkmark beside it. This means the SR has been approved to move through to the next step in the Procurement process.

Denied Sourcing Request

Procurements vary in their complexity, and the process for approving Sourcing Requests reflects this. **A denied Sourcing Request is no reason to panic**. There will be a valid reason and the opportunity to submit another round (a revised request). This will help Procurement to understand exactly what you need from the beginning to save time and money.

When a Sourcing Request is denied, an email notification is sent with the reason, the status changes from **In Approval** to **Denied** under Task History (**View Task Details**), and there is a red exclamation mark beside the Task. The Request status will be set to '**on hold**' until the new round has been received and approved.

From the **Task History** screen, you can view the Reviewer comments, and there is an option to submit a New Round.

1. Click **New Round**.
2. Steps 1 and 2 need no action.
3. Review the comments and add a message if required.
4. Click **Submit**.

Once the New Round has been submitted, the status changes again from **Denied** to **In Approval** and when it is approved, the status will change to **Approved** and an email notification will be sent.

Contract Request

What is a Contract Request?

A Contract Request (CRW) is a request to modify, amend or extend an existing contract for a good, service or construction. They are an essential part of Procurement's Contract Management process. Some typical requests include amendments to project scope, dollar value, and expiry date.

When is a Contract Request Required?

DO submit a Contract Request **IF**

- there is an **existing contract** in place for the good, service, or construction (contract requests are for changes to scope, dollar value, extensions, etc., not purchases).

DO NOT submit a Contract Request **IF**

- you are purchasing off an existing **Standing Offer**.

The diagram below shows the Workflow process for a Contract Request.

When creating a Contract Request, it is important to first search the system to find any existing contract (CW). If it can't be found, then contact Procurement Support and submit a ticket, or call 902 424 5770.

Creating a Contract Request (CRW) as a Follow-on from a Contract Workspace (CW)

The first step is to search for the Contract Workspace in Ariba. It can be searched by number (CW#). Once the CW has been located, the CRW can be created from it and much of the detail will be completed. **However, do not spend too much time searching for something that may not be there or that you may not have access to**. If you are unable to locate it, contact Procurement Support (see Note above). Proceed **ONLY** if you have the CW#.

1. Navigate to the Search bar on the Home tab of the Dashboard.
2. From the Search bar, click the down arrow key beside the Search bar and select **Contract Workspace (Procurement)**. (Figure 7)
3. In the Search bar type the CW# (e.g. CW5519) and click the magnifying glass.

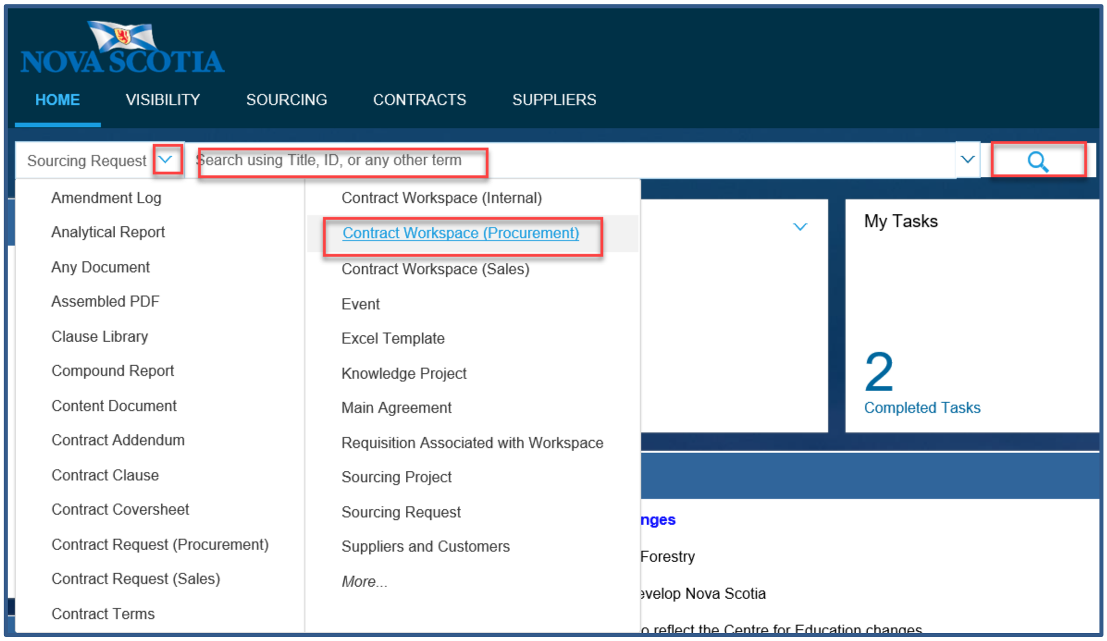

Figure 7

4. From the search result, click the CW and select **Open**.
5. Navigate to the **Overview** tab. Verify it is the correct Contract Workspace (ID No., Title, etc.).
6. Click the down arrow key beside **Actions** and select **Follow-on Project** (Figure 8).
7. Select **Contract Request (Procurement)**. The **Create Contract Request (Procurement)** screen appears (Overview form).

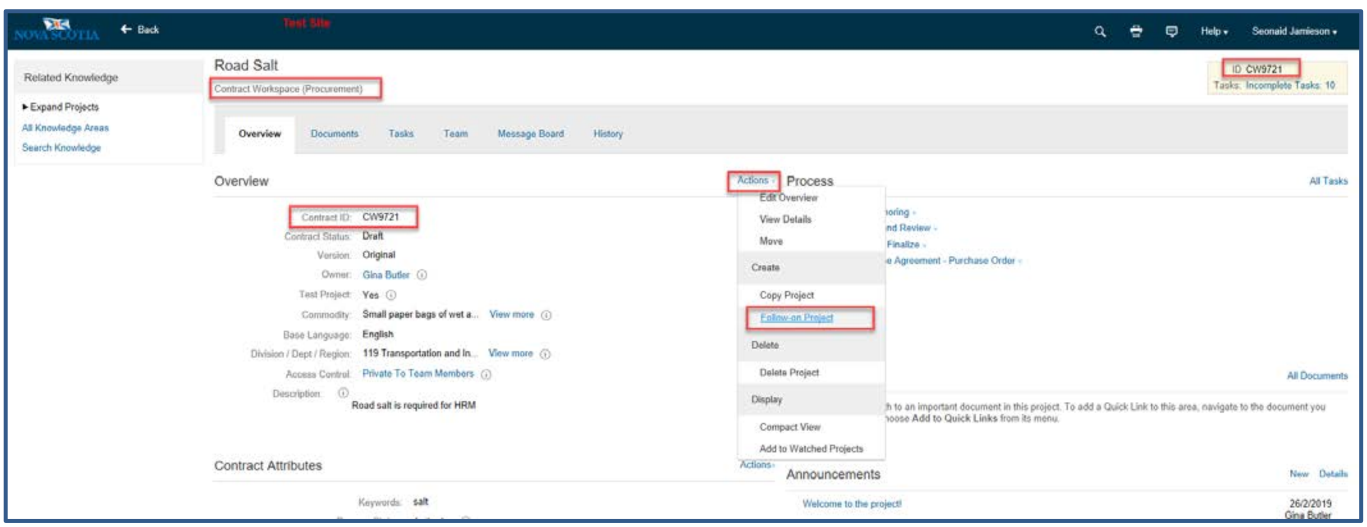

Figure 8

8. Complete the fields as outlined below in Completing the CRW Overview Form.

Completing the CRW Overview Form

The Overview form captures key information. Note that, as the CRW has been created from a Contract Workspace (CW), many of the fields will already be populated.

1. Complete the fields as follows, **leaving others 'as is' unless otherwise required.** Ensure all mandatory* fields are completed.

Label	Description
Name:*	The title should identify the good, service or construction being sought. Do **NOT** use the name of a vendor or previous contract.
Description:	The description will be carried forward from the CW. However, additional details can be inserted here, for example, a brief description of what is required in the amendment.
Copy from Contract:	Leave as is (no value).
Test Project:*	Default is **No** – leave as is.
Base Language:	Default is **English**; the other option is **French**.
Supplier:	The supplier is added here and will be populated from CW.
Affected Parties:	This field is optional and may be populated from CW, usually with the supplier added above; more Affected Parties can be added if applicable.
Contract Amount:	The current contract amount will be populated from the CW and is the full value of the initial term of the contract. For example, 3 years at $100,000 per year is $300,000.
Commodity:*	This field should already be populated; however, it can be edited and added to, if applicable. Click **Search more** and drill down to find your specific commodity (see Multilevel Dropdown Fields for more information).
Division/ Dept. / Region:*	This field will already be populated; however, it can be edited, if applicable. Click **Search more** and drill down to find your specific department (see Multilevel Dropdown Fields for more information) – **DO NOT** select the parent categories such as the *Province of Nova Scotia*, *Nova Scotia Health Authorities*, or *Nova Scotia School Boards*. If request is for a Province wide contract, choose all that are applicable.
Predecessor Project:	This field will be pre-populated with the CW it is created from.
Procurement Type:*	This field may be pre-populated from the CW but can be edited. This selection will decide which procurement group (goods, services, clinical or construction) the request is assigned to. **NOTE: If this selection is not correct, delays can occur.** For example, the Construction group cannot approve Clinical or Goods & Services and vice versa. **Be Specific**. Take your time to choose the **CORRECT** category as this determines the routing of your CRW to the appropriate team within Procurement (e.g. Clinical Equipment Maintenance/Service, choose the respective CLINICAL Procurement Type). If unsure, click the info ⓘ button for examples.
Contract Type:*	This field will be populated from the CW.
Who is the Subject Matter Expert for Procurement to Contact?:*	Enter the name, phone number and email of SME for Procurement to contact. This individual is the person in your organization who is currently best suited to discuss requirements. This is a new, mandatory field.
Funding Authorization Required?*	**This field only appears when a 100 series (PNS) Division/Dept is selected**, and is mandatory – choices are **Yes** or **N/A**. Select **Yes** if applicable – at least one of the following options should be selected: A Report and Recommendation (**R&R**); Tangible Capital Assets (**TCA**); Ministerial Approval (**MA**); A Professional Services Directive Request (**PSR**); A Memorandum to Executive Council (**MEC**). See Figure 9 below.
Copy all documents from the parent project?	Default is **No**. Leave as is.

Label	Description
Copy all project groups from the parent project?	Default is **No**. Leave as is.
Agreement Date:	This is the date the contract is signed.
Term Type:*	Default is **Fixed**.
Effective Date:*	The date the contract comes into effect; may already be populated but can be changed.
Expiration Date:	May be populated from the CW; if so, clear this field.

NOTE:

- Clicking the info ⓘ symbol provides a brief overview of each selection type.
- At the end of the info commentary is some blue text. This is a hyperlink to related Treasury Board information.

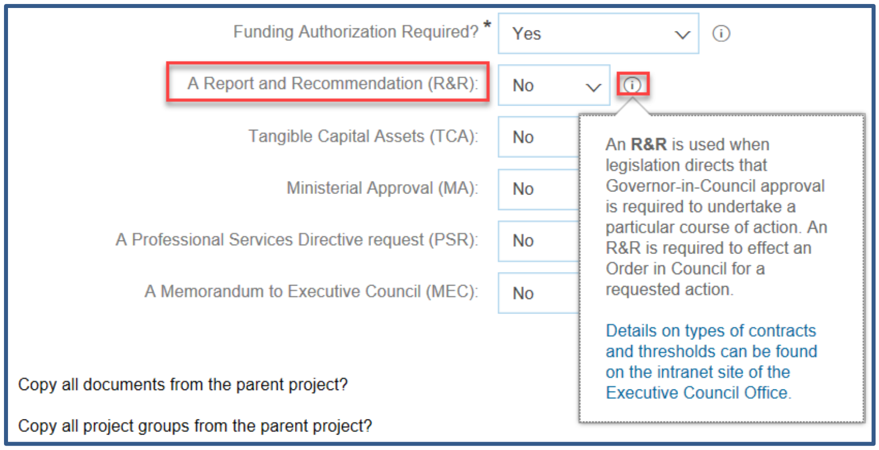

Figure 9

Supporting Documents

Now that the Contract Request has been created, the next step is to upload the supporting documents. These documents vary from project to project. Their purpose is to provide examples and context to help Procurement understand and approve the request. For example, the original contract and outline agreement (if there is one) and any related documents such as new specifications and itemised price changes

Under the **Documents** Tab, upload a copy (SEPARATELY) of any of the following that are applicable (instructions on uploading are provided below):

- ✓ Copy of previous tender document and addendum documents (or one from another jurisdiction)
- ✓ Copy of previous contract and amendments
- ✓ Market Research (if available)
- ✓ Specifications (if available)
- ✓ SOW – Statement of Work

If this is request for an ALTP, please ensure the following documents are included:

- ✓ Signed ALTP (If support already received from Procurement)
- ✓ Contract to accompany ALTP (If the contract has already been signed, you must include with your request)
- ✓ SOW - Statement of Work
- ✓ Quote(s)

Uploading Supporting Documents

1. Navigate to the **Documents** tab.
2. Click the **Actions** button to expand menu.
3. Under **Upload**, select **Document**. The **Create Document** screen appears.

4. **Upload file:** Click the **Browse** or **Choose File** button to locate the file to upload. You can also drag and drop the file into the box. File names should reflect the content (e.g. *Original Contract*) and be uploaded one at a time, not grouped into one large file.
5. **Description:** Enter a short description of the file contents (for example *Itemised changes updated June 10*).
6. Click **Create** ➢ **Done**.

Repeat steps 2-6 above to add more documents as required. In the screenshot (Figure 10), an Excel Workbook and a PDF file have been added.

Clicking on each file will give the option to **Download Draft**, **Copy**, **Move** or **Delete**, **Publish** etc.

If you inadvertently uploaded the incorrect file, follow the instructions in Replacing Documents on page 16 to replace it.

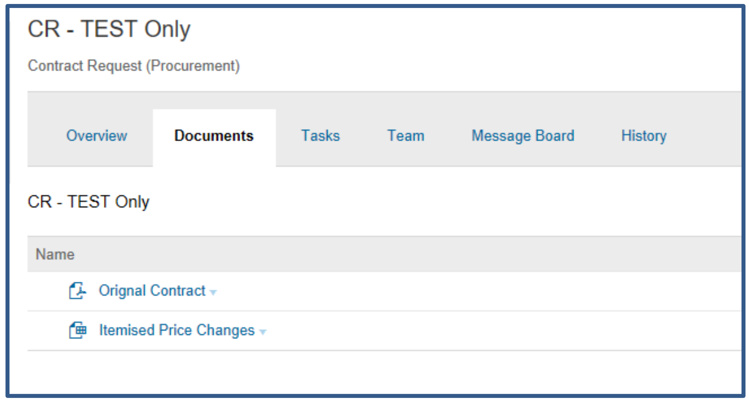

Figure 10

Submitting a Contract Request

Once all the supporting documents have been uploaded, and the details thoroughly checked, the Contract Request can be submitted to Procurement.

REMINDER: Be sure to double-check that all the information you have entered is correct and relevant and check all the required documents have been added. If you need to replace any documents, follow the steps in the Replacing Documents section on page 16. Once you are certain all necessary information has been added, follow the steps below to submit the request.

1. Navigate to the **Tasks** tab.
2. Select the dropdown arrow and **Action** ➢ **View Task Details**. The Approval Task screen is displayed (Figure 11).
3. Steps 1 and 2 require no action.
4. Step 3: Optional – if required, enter a brief description. Note however, that this will be viewed by the Approver and not the Specialist to whom it is later assigned.
5. Do **NOT** add attachments to the task as they may be missed.
6. Step 4: Click **Submit**.

Once the Contract Request has been submitted, the status under the **Tasks** tab changes from **Not Started** to **In Approval**.

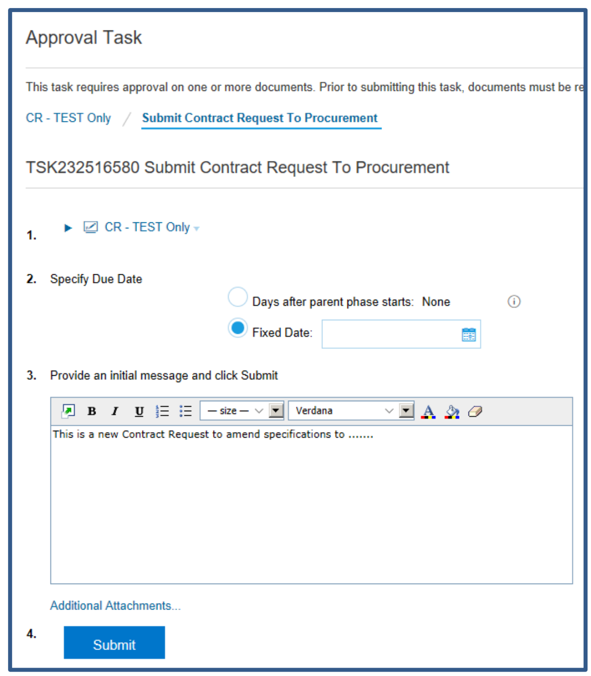

Figure 11

Approved Contract Request

When a Contract Request is approved, an email notification is sent to you and under the **Tasks** tab the line item status changes from **In Approval** to **Approved** and there is a green checkmark beside it. This means the CRW has been approved to move through to the next step in the Procurement process.

Denied Contract Request

Procurements vary in their complexity, and the process for approving Contract Requests reflects this. **A denied Contract Request is no reason to panic!** There will be a valid reason and the opportunity to submit another round (a revised request).

When a Contract Request is denied, an email notification is sent with the reason (Figure 12), the status changes from **In Approval** to **Denied** under Task History (**View Task Details**), and there is a red exclamation mark beside the Task. The Request status will be set to '**on hold**' until the new round has been received and approved.

From the **Task History** screen, you can view the Reviewer comments and there is an option to submit a **New Round**.

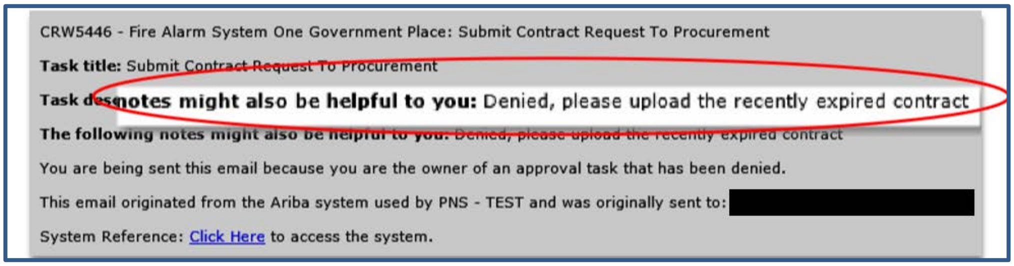

Figure 12

1. Click **New Round**.
2. Steps 1 and 2 need no action.
3. Next, review the comments and add a message if required.
4. Click **Submit**.

Once the New Round is submitted, the status changes again from **Denied** to **In Approval**, and when it is approved, the status will change to **Approved** and you will receive an email notification.

Multilevel Dropdown Fields

Ariba sometimes requires you to search a multilevel dropdown field, such as the *Commodity* and *Division/Dept./Region* field in the Overview Form when creating a new Sourcing or Contract Request. There are two ways to navigate these fields – using keywords and drilling down using the dropdown arrows.

Using Keywords

1. Navigate to the relevant field (*Commodity* or *Division/Dept./Region*).
2. Start typing the Commodity or Department name and click **Search More** (Figures 13 & 14).
3. Drill down if necessary, by clicking the ▶ symbol to expand.
4. Select the box beside the required Commodity or Department (Figures 15 & 16).
5. Click **Done**.

Figure 13

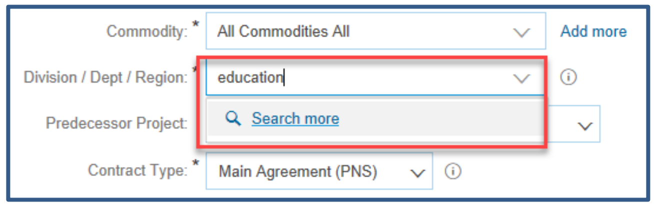

Figure 14

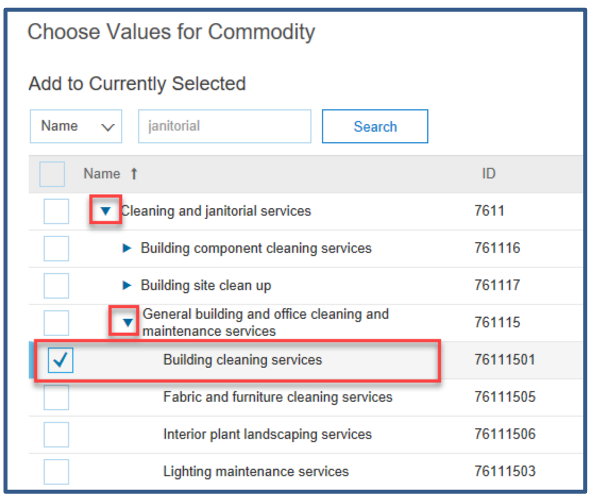

Figure 15

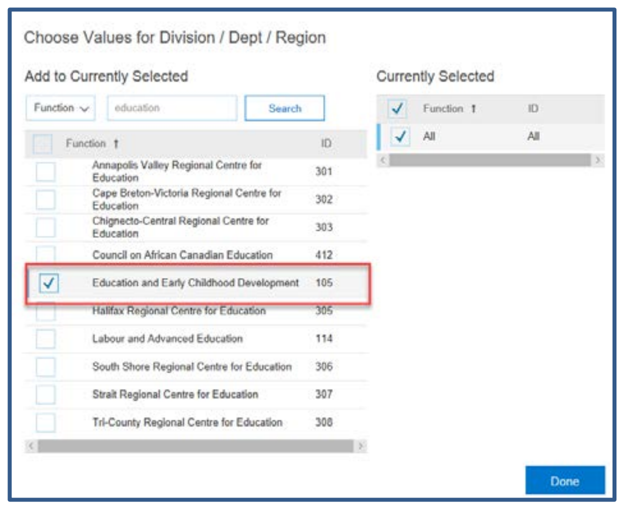

Figure 16

Drilling Down

You can also drill down using the dropdown arrows to locate the required Commodity or Department.

1. Navigate to the relevant field (e.g. *Commodity* or *Division/Dept./Region*).
2. Click the dropdown arrow next to the field and click **Search more**.
3. Use the ▶ symbol to drill down and navigate to the required Department, or
4. Start typing the Commodity or Department name in the Search field and click **Search**.
5. Select the box beside the required Commodity or Department (Figure 17).
6. Click **Done**.

DO NOT select the parent categories such as the Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards.

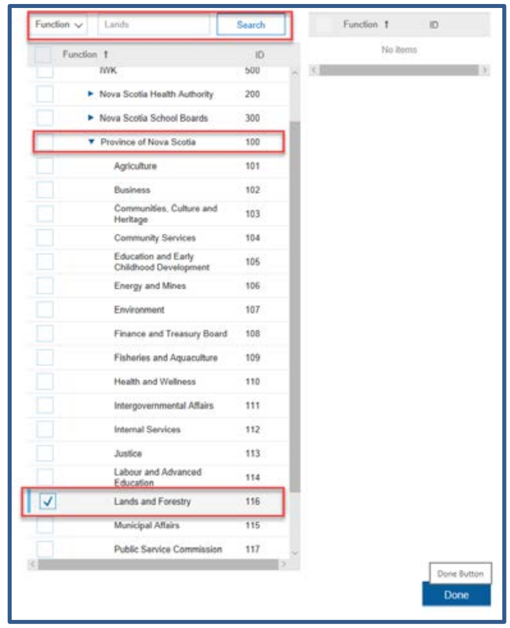

Figure 17

Replacing Documents

If you inadvertently add the wrong document to a Sourcing Request or a Contract Request, or you simply want to replace it, there is a feature within Ariba that allows this.

1. Navigate to the **Documents** Tab of the Request.
2. Click the document you wish to replace.
3. Select **Replace Document** from the menu (Figure 18). The Replace Document screen appears (Figure 19).

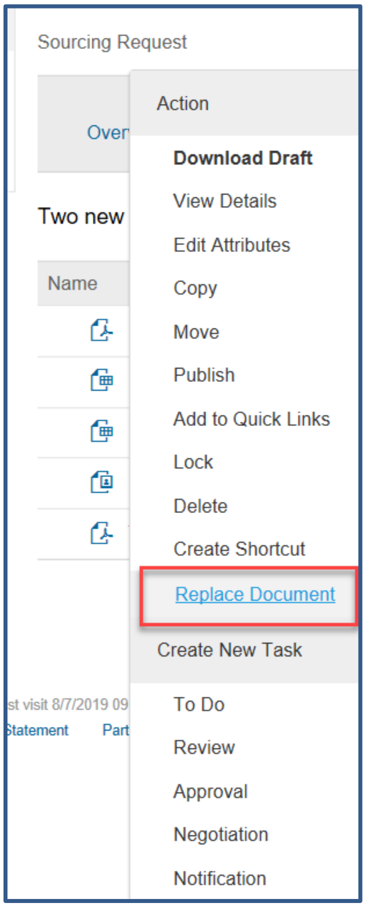

Figure 18

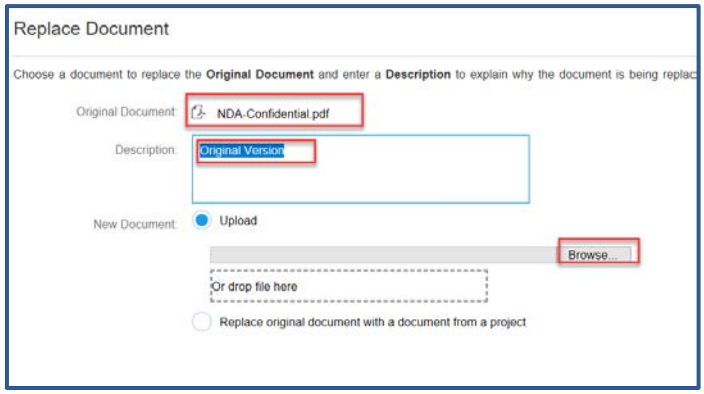

Figure 19

4. Click the **Browse** or **Choose File** button, locate the file and click **Open.**
5. Or **Drag and drop** the file into the box.
6. Add a description.
7. Click **Replace**.

If the file has the same name and type, the next screen that appears is the **Save Version** screen. If it has a different name and/or type, the following options will be available:

- Use the original document name and continue uploading of file
- Replace the document by the uploaded file
- Select another file for upload

Make your selection and click **OK**. This will open the Version Edit screen, which gives the option to save the changes as a new version or to continue editing v1.

- If **Yes, save as v2** is selected, you can enter a version comment.
- If **No, save and continue editing v1** is selected, the Version Comment box disappears.

8. Enter version comments if applicable.
9. Click **Save**.

Version History

To view the version history of a document:

1. Navigate to the **Documents** tab and locate the document you wish to view.
2. Click the document and select **View Details** from the menu. The Document Overview tab is displayed (Figure 20). This shows the name of the document, description, status, version number, version comment etc.

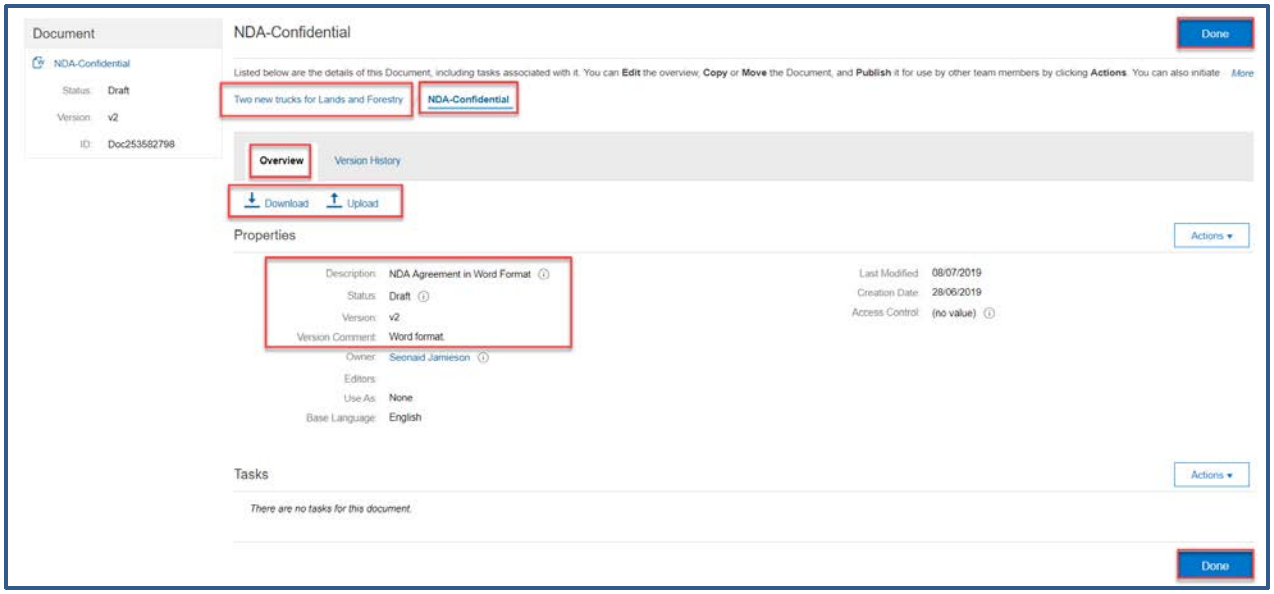

Figure 20

3. Click the **Version History** tab. This displays the document name(s) and the version numbers and who modified the document.

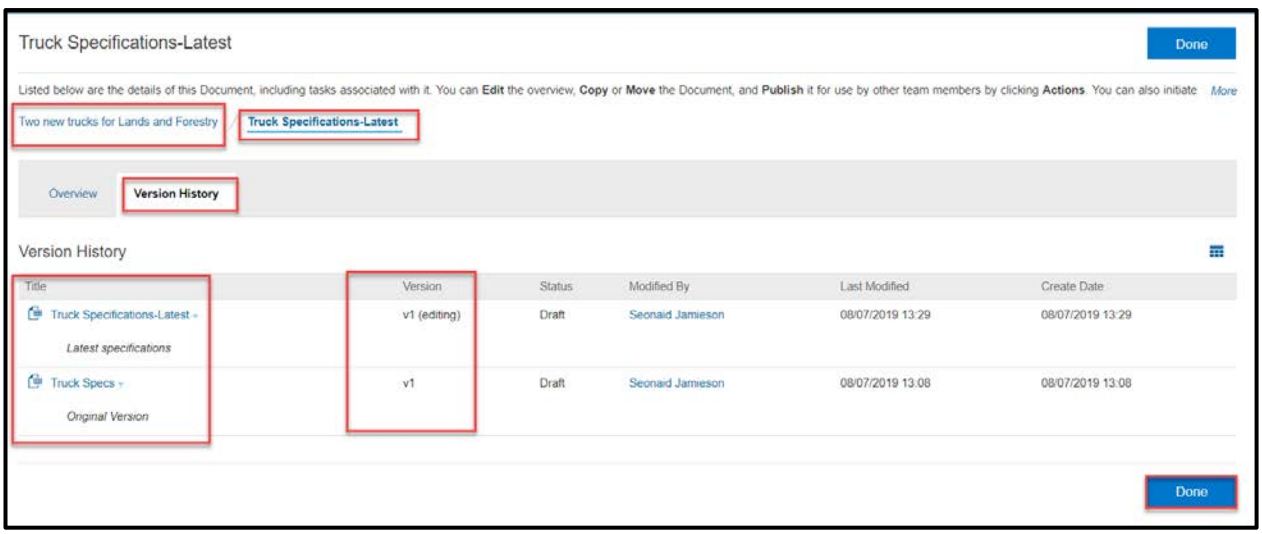

Figure 21

In Figure 21 above the document name has been changed but the version is still version 1. In Figure 22 below there are versions 1–4 and v4 has been replaced and is being edited. The Version History will always show the original version of the document.

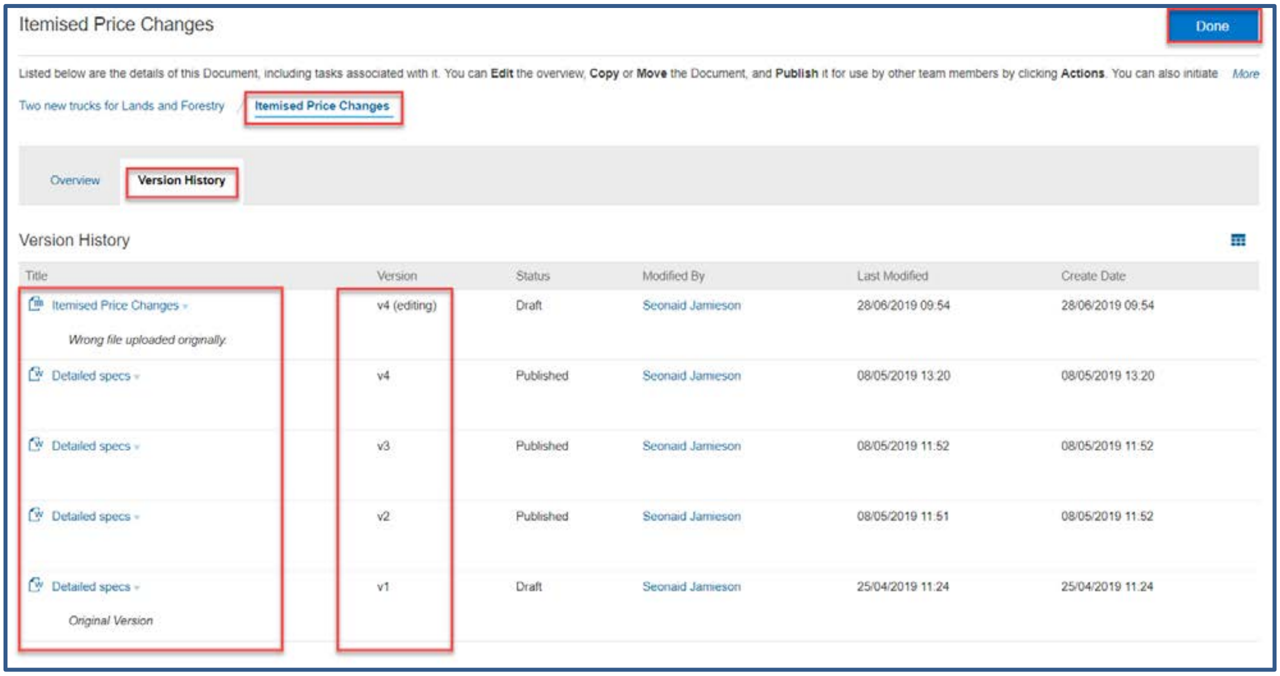
Itemised Price Changes
Done
Listed below are the details of this Document, including tasks associated with it. You can Edit the overview, Copy or Move the Document, and Publish it for use by other team members by clicking Actions. You can also initiate More
Two new trucks for Lands and Forestry
Itemised Price Changes
Overview
Version History
Version History
Title
Version
Status
Modified By
Last Modified
Create Date
Itemised Price Changes
Wrong file uploaded originally.
v4 (editing)
Draft
Seonaid Jamieson
28/06/2019 09:54
28/06/2019 09:54
Detailed specs
v4
Published
Seonaid Jamieson
08/05/2019 13:20
08/05/2019 13:20
Detailed specs
v3
Published
Seonaid Jamieson
08/05/2019 11:52
08/05/2019 11:52
Detailed specs
v2
Published
Seonaid Jamieson
08/05/2019 11:51
08/05/2019 11:52
Detailed specs
v1
Draft
Seonaid Jamieson
25/04/2019 11:24
25/04/2019 11:24
Original Version

Figure 22