

# Quick Reference Guide: Searching Standing Offers



This document shows Ariba Clients how to search for Standing Offers using keywords and filters, bookmark/save, and access a search, and how to find information within Standing Offers.

## Search Accessible Standing Offers

1. Log in to Ariba and click on the Nova Scotia logo to reach the **HOME** page, if not already there.
2. Ensure the Search box (Figure 1) is set to **Contract Workspace (Procurement)**.
3. Press Enter or click the magnifying glass (Figure 1) to open the Search page. Alternately, enter 1 – 2 keywords in the Search bar and press Enter.

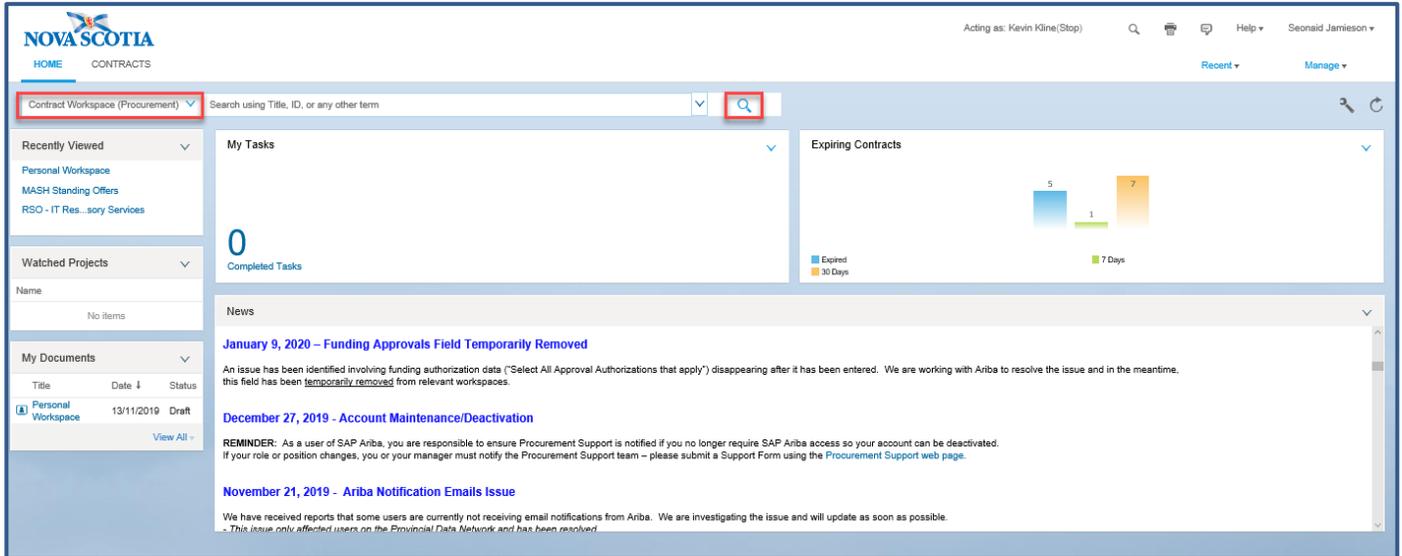


Figure 1

The Search page may display the most recently viewed projects only.

4. Click **Reset** ➤ **Search** to view all projects.

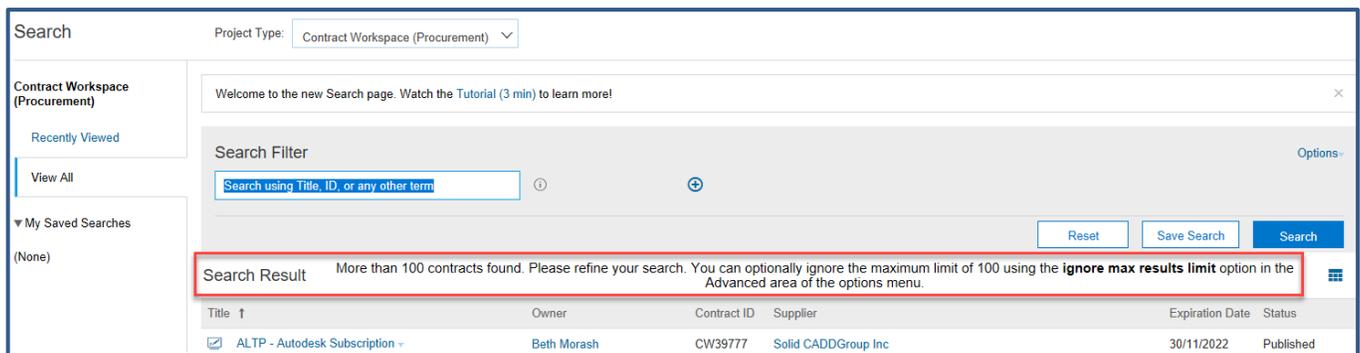


Figure 2

Your search results may display over 100 contracts (Figure 2). It is possible to go to **Options** > **Ignore Maximum Results Limit** and scroll through the many Standing Offers to find the correct one. However, this is time consuming; it is quicker and easier to use the **Search Filters** or **Keywords Field** to narrow the search.

Search Filters

The first and quickest option would be to enter a keyword in the Search box and click **Search**, which may be enough, and then scroll through the results. However, if too many results are returned, you can apply filters to further refine the search.

1. Click the plus (+) symbol to add another filter field (jump to the next section to add and search on the **Keywords Field**).
2. Click the minus (-) symbol to remove a field.
3. Click the down arrow key beside a field to display other fields (Figure 3).

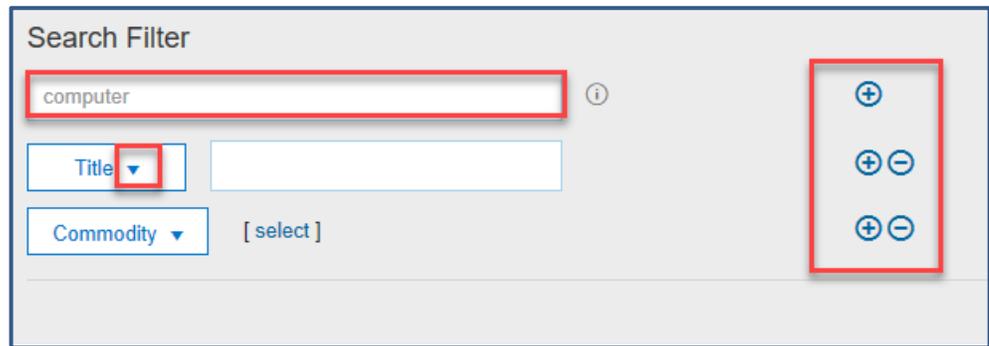


Figure 3

5. Click **Others** in the dropdown menu to display all available fields for additional Search filters (listed in alphabetical order).
6. Place a checkmark in the box beside each field to include (see Figure 4).

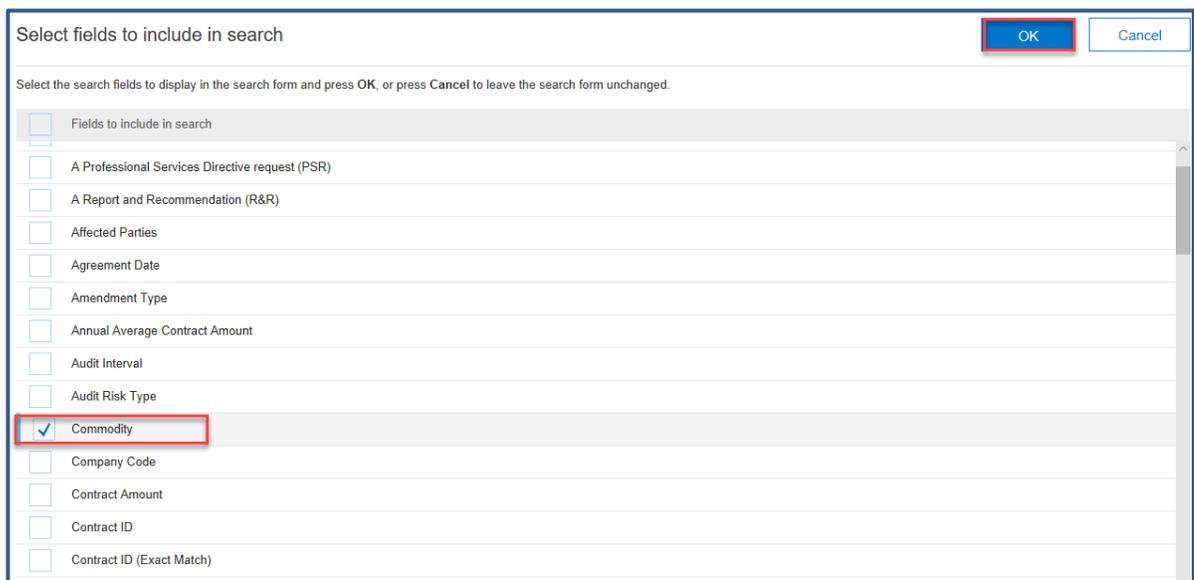


Figure 4

7. Click **OK**. Add more fields as required.

The added fields will either

- a. be freeform (e.g. *Title* or *Keywords*) – type in the title or part of the title, or enter keyword(s).
- b. have **[select]** to click and search from a list (e.g. *Commodity*) – click **[select]**; type in part of Commodity name; click **Search**; place a checkmark in box beside chosen Commodity; click **Done**.
- c. or have a dropdown selection to choose from (e.g. *Contract Status*) – click the dropdown arrow and choose from menu.

Figure 6 below displays the result of a search on *chair*, Commodity *Office furniture*, and Contract Status *Published* (2 contracts).

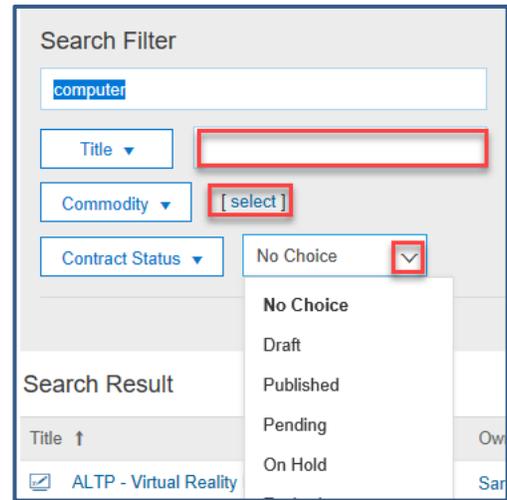


Figure 5

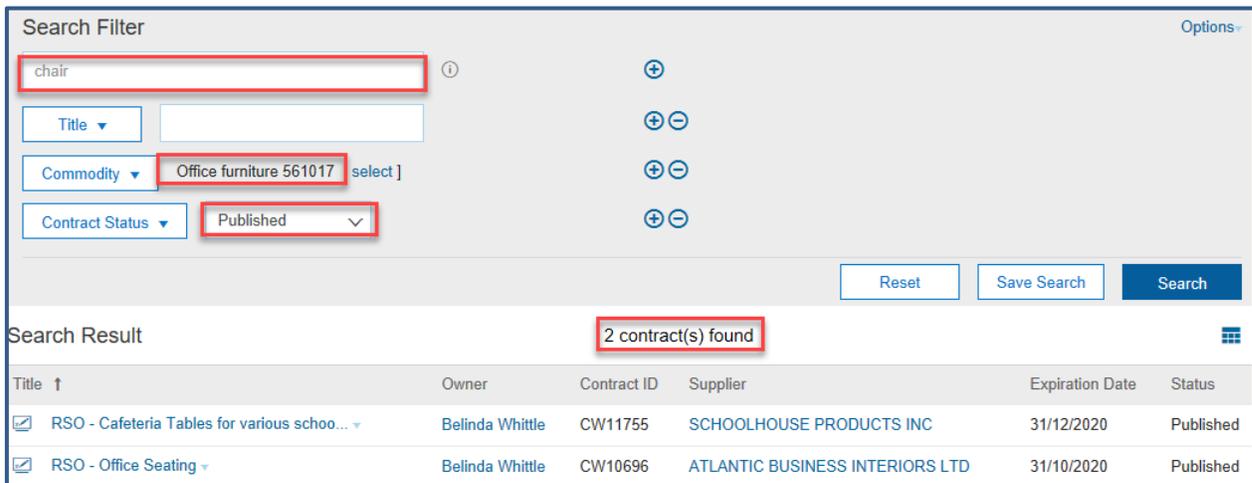


Figure 6

8. Click the **Reset** button to clear the current search and click **Search** again to view all.

Figure 7 below displays the result of a search on *chair* (entered in the Search bar on Dashboard), on **Title** beginning with *RSO* (Standing Offers) and **Contract Status Published**.

- a) Add the **Title** field and type **RSO (followed by a space and a hyphen and another space)** – e.g. *RSO -*
- b) Add the **Contract Status** field and select **Published** from the dropdown menu.
- c) Click **Search**.

The screenshot shows a search filter with the following settings: Search Filter: chair; Title: RSO -; Contract Status: Published. The search results table is as follows:

Title ↑	Owner	Contract ID	Supplier	Expiration Date	Status
RSO - Basic Pre-Primary Program Material...	Belinda Whittle	CW25083	Louise Kool & Galt	30/04/2021	Published
RSO - Collaborative Area and Educational...	Belinda Whittle	CW17988	OFFICE INTERIORS GROUP	31/07/2021	Published
RSO - Office Paper	Michelle Pettipas-Mackinnon	CW23053	Staples Business Advantage	29/10/2021	Published
RSO - Office Seating	Belinda Whittle	CW10696	ATLANTIC BUSINESS INTERIORS LTD	31/10/2021	Published
RSO - Small Wares for various schools th...	Belinda Whittle	CW11766	J R MAHONEY LTD	31/12/2021	Published

Figure 7

There are 5 contracts. These are all current. **NOTE: results may change daily as some contracts expire and more are added.**

### Keywords Field

This feature helps in the search for items or service where the title of the Standing Offer may not reflect the full product. For example, a Standing Offer with many suppliers offering a wide range of training courses may just be named *Learning and Development Supply Arrangement*.

In Figure 8 below, I have added the **Keywords** field, entered *Excel Courses* in the field and it has returned just one contract (Standing Offer). This is because *Excel Course* is in the Keywords field in the Workspace, even though it is not in the Title.

The screenshot shows a search filter with the following settings: Search Filter: Search using Title, ID, or any other term; Keywords: Excel course; Contract Status: No Choice. The search results table is as follows:

Title ↑	Owner	Contract ID	Supplier	Expiration Date	Status
RSO - Learning and Development Supply Ar...	Staci MacAskill	CW47541	The Barrington Consulting Group Inc	30/06/2024	Published

Figure 8

To add the **Keywords** field:

1. Click the down arrow beside an existing field or click the plus (+) sign to add another.
2. Select **Others** from the dropdown menu.
3. Scroll down (these are listed alphabetically) and place a checkmark in the box beside **Keywords**.
4. Click **OK**.

5. Now type in what you are looking for in this field, for example, *First Aid Training*, *LEAD Training*, or *Apple*.
6. Click **Search**.

### Save a Search

There are times when a Saved Search may be useful as it can be accessed from the Dashboard and from the Search page by just one click. Let's say you want to save your Keyword search of Excel Courses (Figure 8), or all current RSOs (Standing Offers) with *chairs*, as in Figure 7 above. Or all current Standing Offers from Commodity *Office furniture* as in Figure 6 above.

1. Carry out a Search as above using the [Search Filters](#) and/or the [Keywords Field](#).
2. Once you have your results, for example Excel Courses (Figure 8), or by Commodity (Figure 6), or all current RSOs (Figure 7), click **Save Search**.
3. In the **Save Search** box type an appropriate name for the Search (e.g. *Training Courses*, *Office furniture*, or *Current RSOs*).
4. Click **OK**.

These saved Searches will now appear in the left margin of the Search page and they will also be available from the Dashboard. **NOTE: These are examples only; you can create your own Search.**

### Access/View a Saved Search

1. From the **HOME** Dashboard, ensure that **Contract Workspace (Procurement)** is selected at the Search bar.
2. Click the down arrow beside the Search box.

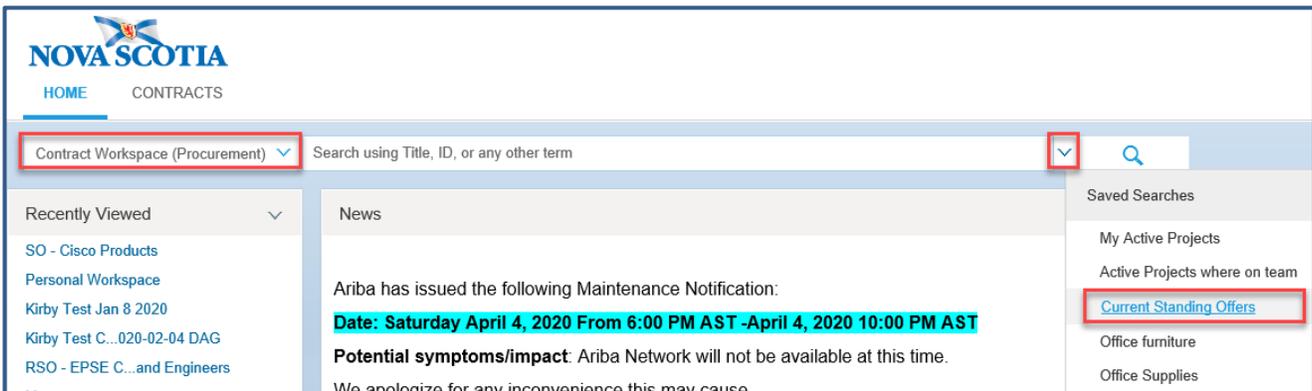


Figure 9

3. Click on the saved Search (Figure 9). This opens the Search page with the results of the saved Search.
4. From the Search page, click any of the saved Searches under **My Saved Searches** to view (Figure 10).

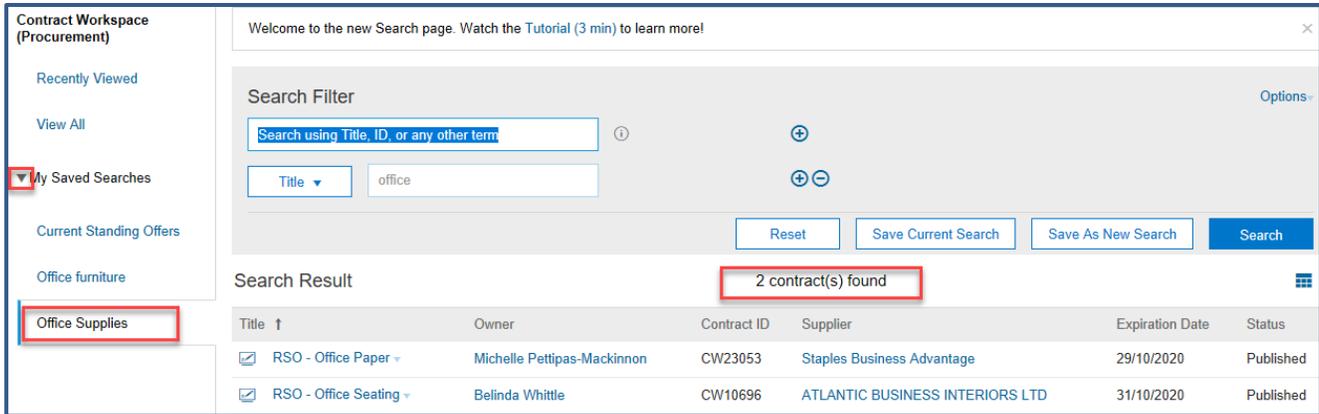


Figure 10

5. Click the **Reset** button to clear the current search and click **Search** again to view all to begin a new search.

**NOTE:** Contracts in **Draft Amendment** status can still be used, so when selecting **Contract Status**, it may be worth choosing **Draft Amendments** as another Search option to save. That is, you could have a Saved Search named **CWs in Draft Amendment** and one in **Published** status. As with the other searches, results in this list will change as the statuses are updated.

### Find Information on the Standing Offer

The most useful information for Clients is found on the **Overview** page or within the **Documents** tab. **If the Documents tab is not visible:**

- Click the **Actions** button next to the Overview heading.
- Select **Full View** (Figure 11). The **Documents, Tasks**, tabs etc. are now visible.

### Overview Tab

The **Overview** tab provides a summary of the Workspace, such as, who the Project Owner is (typically a Procurement Specialist), the description and contract attributes and so on.

1. The **Owner** field displays the name of the Procurement Specialist, who is the Project Owner.

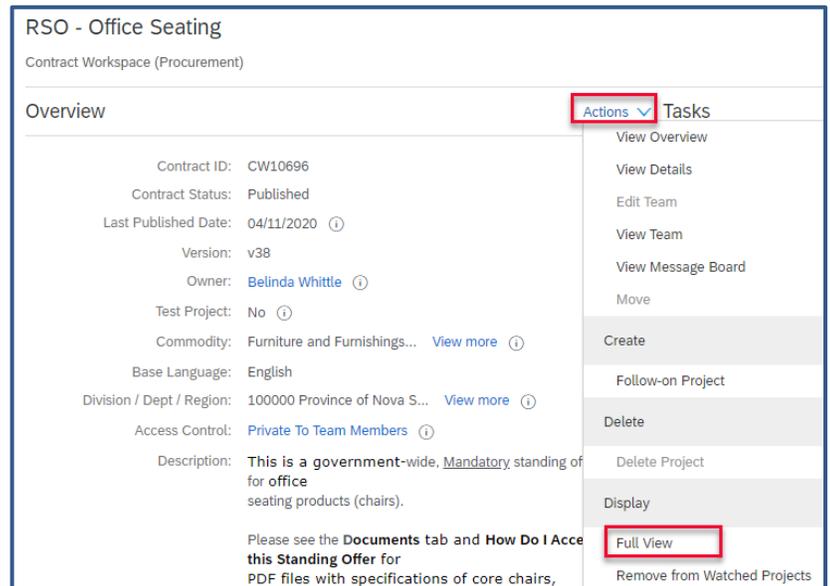


Figure 11

2. The **Description** field provides a brief outline of what products or services are offered and notes on who can access the contract, and often instructions on how to buy from it, or where to access the documents for information (Figure 12). Oftentimes, there will be a contact name, email address and/or telephone number in the Description field.
3. Scroll down to the **Contract Attributes** area for information on the Supplier(s).
4. See the **Contract Term Attributes** area for information on effective dates and expiration dates of contract (Figure 13).

Description: ⓘ

This is a government-wide, Mandatory standing offer for office seating products (chairs).

Please see the **Documents** tab and **How Do I Access this Standing Offer** for PDF files with specifications of core chairs, pricing, and details of how to order from this standing offer for provincial employees.

NS Public Sector Entities sector entities can place orders directly with the vendor by contacting Ryan Beaton and referencing this standing offer.

rbeaton@atlanticbusinessinteriors.ca (email preferred)

Direct Line: [\(902\) 233-8547](tel:9022338547)

All entities will receive the same pricing on the items listed in this standing offer:

Keywords: office, seating, chair, Atlantic Business Interiors, CW10696, 60149540

Figure 12

**Contract Term Attributes** Actions ▾

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Term Type: Fixed ⓘ

Effective Date: 31/10/2016 ⓘ

Original Expiration Date: 31/10/2019 ⓘ

Expiration Date: 31/10/2021 ⓘ

Expiration Email Recipients: (no value) ⓘ

Email Notification: First sent 120 days before contract expiration date.  
Reminder sent every 30 days.

Notice Period(in days): 0 ⓘ

Figure 13

Quick Links

A Quick Link is just that – one click on the link to download and open the document, eliminating the need to go to the Documents tab and find the required documents. Quick Links could include documents with instructions on how to access the Standing Offer, or a pricing schedule for example. You will see Quick Links on the **Overview** tab below the Process and above Announcements.

Division / Dept / Region: 100117 Public Service Com... [View more](#) ⓘ

Access Control: Private To Team Members ⓘ

Description: ⓘ Supply Arrangement for Learning and Development Services for the Province of Nova Scotia.

Supply arrangement users may include the PSC's Corporate Learning Centre, in addition to all other provincial departments, agencies, boards and commissions. Additionally, MASH sector entities i.e. municipalities, academic institutions, school boards, and health care facilities may also access the standing offer.

ALL Supply Arrangement Users are required to follow the "Guidelines for using the Learning and Development Services Supply Arrangement". These can be found in the Documents tab in this Contract Workspace.

**Quick Links** All Documents

- Guidelines for using the Learning and Development Services Supply Arrangement ▾
- List of Approved Vendors and Courses ▾
- Statement of Work (SOW) Template ▾
- Statement of Work (SOW) Evaluation Template ▾
- Call-Up Form ▾

Announcements [New](#) [Details](#)

Figure 14

## Documents Tab

The **Documents** tab houses the actual signed contract, the Outline Agreement documents, and other useful information on the products/services provided. Additionally, you will find further instructions on how to purchase off the Standing Offer agreement, if applicable.

1. Click the triangle icon to the left of each folder to expand it and see the files within.
2. Click the relevant file and select **Download**.

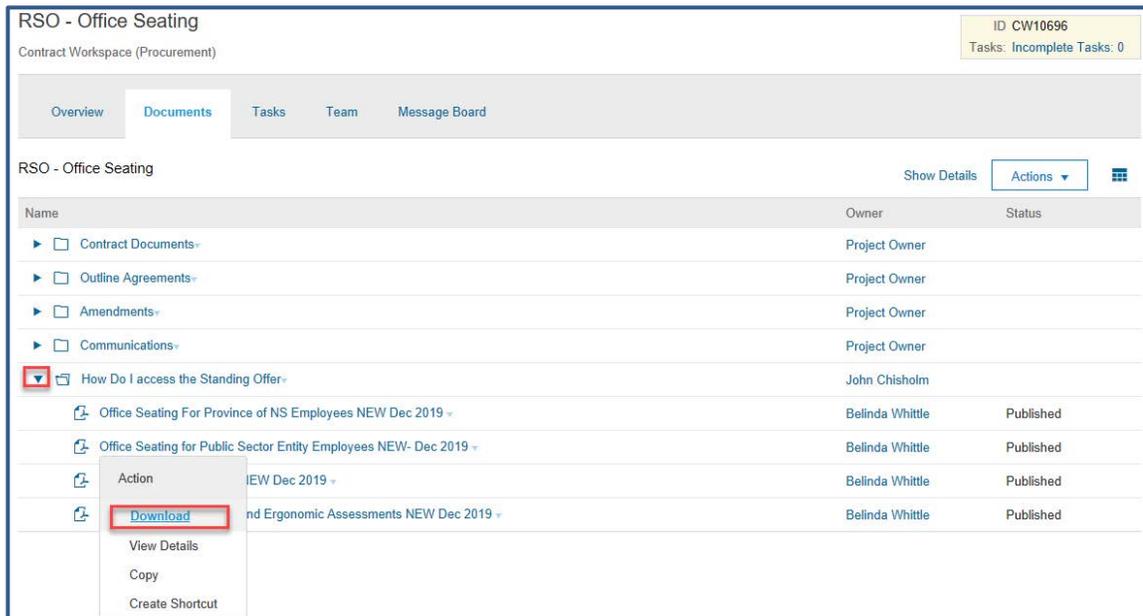


Figure 15

3. Select **Open** to open the document.

## Additional Help

For additional help on Ariba or Standing Offers please contact [Procurement Support](#) to submit a ticket.

The latest copy of this document can be found on the [NS Procurement website](#) at the bottom of the page under **Ariba Reference Documents**.