



# Creating & Submitting a Sourcing Request

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## 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;
- 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 (PNS) 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 Document and select **Publish** to change the status from Draft;
- 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.

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## Sourcing Request

### What is a Sourcing Request?

A Sourcing Request (SR) is a key intake tool for Procurement to begin any new procurement project (RFX, ALTP, etc.) over threshold. Complete and detailed information provided by you 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 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 expired, or is about to expire.

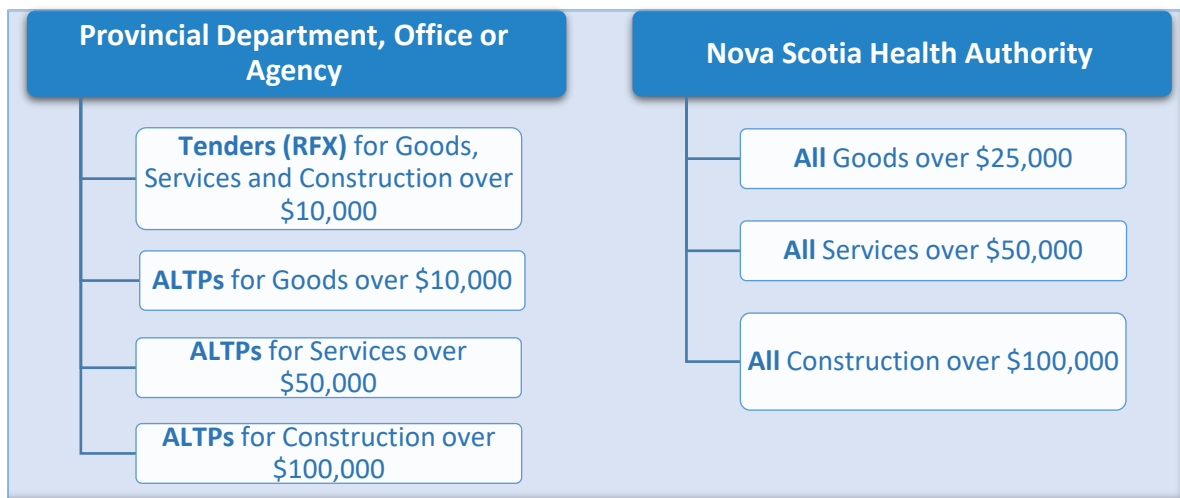
#### DO submit a Sourcing Request IF

- 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



**NOTE:** If you are extending an existing contract or standing offer, see [Error! Reference source not found.](#) page [Error! Bookmark not defined.](#)

## Steps for Creating a Sourcing Request

There are three steps to creating and submitting a Sourcing Request.

1. Create Sourcing Request (*fill in the form*);
2. Upload Supporting Documents;
3. And the final step, most importantly, is to [Submit Sourcing Request](#).




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**TAKE CARE! This third and final step is often missed and can cause delays!**

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## Create Sourcing Request

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).

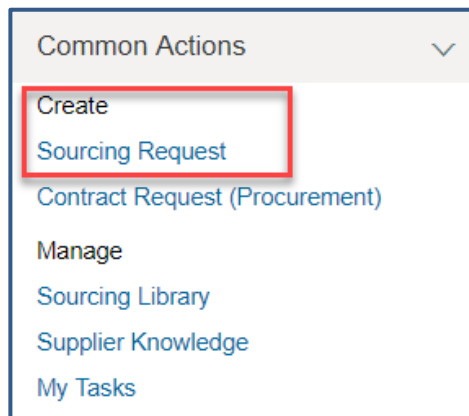


Figure 1

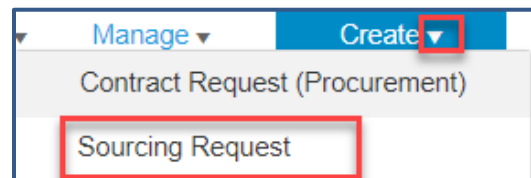




Figure 2

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
<b>Name:*</b>	Explain in a few words what you are looking for ( <i>for example, Two new trucks for Lands &amp; Forestry</i> ). Do <b>NOT</b> use the name of the vendor or previous contract. The title should identify the Good or Service being sought.
<b>Description:</b>	Insert description including the following: <ul style="list-style-type: none"> <li>✓ Brief description of what is required/requested</li> <li>✓ If applicable, identify if the expectation is an ALTP or Tender (<i>RFX</i>)</li> <li>✓ Previous tender number or Contract Workspace # (<i>if applicable</i>)</li> <li>✓ Previous vendor who held this contract (<i>if applicable</i>)</li> <li>✓ Previous Contracts, Purchase Order or Outline Agreement # (<i>if applicable</i>)</li> </ul>
<b>Copy from Project:</b>	Leave as is (no value).
<b>Project State:</b>	Default is <b>Active</b> . Leave as is.
<b>Test Project:*</b>	Default is <b>No</b> . Leave as is.
<b>Base Language:</b>	Default is <b>English</b> ; the other option is <b>French</b> .
<b>Division/ Dept. / Region:*</b>  	Use keywords or the arrows to filter down to your specific entity branch level (see <a href="#">Multilevel Dropdown Fields</a> on page 8 for more information). <b>DO NOT</b> select the parent categories ( <i>any ending in 000</i> ), such as the <i>Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards</i> . Selecting a parent category where a lower level exists, will give an error. PNS Departments can be accessed by clicking the ► beside <b>Province of Nova Scotia</b> . If request is for a Province wide contract, choose all at a lower level (i.e. Branch Level) that are applicable. Click the info ⓘ button for more information on levels.
<b>Initial Contract Spend:*</b>	Enter the estimated amount of the procurement value. Do not include renewal values.
<b>Predecessor Project:</b>	<b>Important:</b> Leave this field as (no value).
<b>Procurement Type:*</b>  	Choose from the list. This selection will decide which procurement group ( <i>goods, services, clinical or construction</i> ) the request is assigned to. <b>NOTE: If this selection is not correct, delays can occur.</b> For example, the Construction group cannot approve Clinical or Goods & Services and vice versa. <b>Be Specific.</b> Take your time to choose the <b>CORRECT</b> category as this determines the routing of your SR to the appropriate team within Procurement (e.g. <i>Clinical Equipment Maintenance/Service, choose the respective CLINICAL Procurement Type</i> ). If unsure, click the info ⓘ button, and click link and download document for detailed description and examples.
<b>Project #:</b> (Optional)	Enter your entity's unique tracking number here ( <i>if applicable</i> ). This is used by specific departments to track internal Project or Order numbers to the Sourcing Request.
<b>PNS SAP Req. #:</b>	Enter purchase requisition number, if known.
<b>Who is the Subject Matter Expert for Procurement to Contact?:*</b>	Enter the name, title, 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 mandatory.
<b>Is this a Redevelopment project?:*</b>	Mandatory field used to track the amount of work flowing through Procurement from Healthcare Redevelopment. Select <b>Yes</b> or <b>No</b> .

Label	Description
<b>Complexity (for Procurement use only):</b>	Leave as is (No Choice). This field is for Procurement staff only.
<b>Funding Authorization Required?*</b>	<b>This field only appears when a 100000 series (PNS) Division/Dept /Region Branch level 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&amp;R); Tangible Capital Assets (TCA); Ministerial Approval (MA); A Professional Services Directive Request (PSR); A Memorandum to Executive Council (MEC). See Figure 3 below.</b>
<b>Owner:</b>	On the right-hand side of the screen, this is defaulted from system with the current user's name.
<b>Currency:</b>	This is defaulted from the 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.



The Sourcing Request ID number (*prefixed with SR*) appears on the Overview form in the top-right of the screen and **Sourcing Request** is shown below the name of the Sourcing Request (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 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 signed approval documents
- ✓ 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)

## Upload 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**.

7. Click each of the uploaded files and select **Publish** to change the status from Draft.



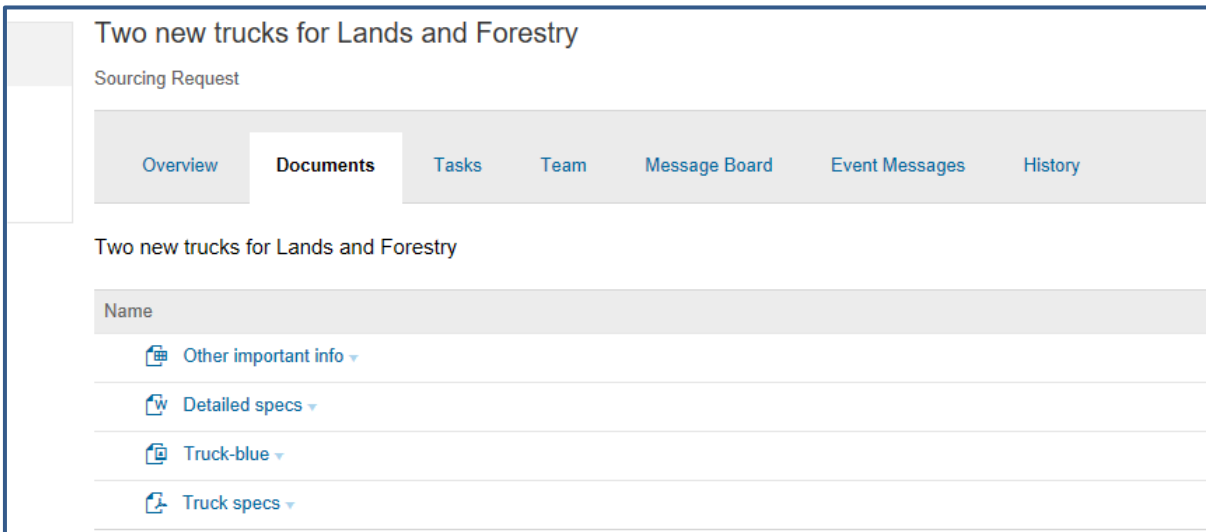


Figure 5



If you inadvertently uploaded the incorrect file, it can be replaced. Follow the instructions to [Replace Documents](#) page 10 to do this.

## Submit Sourcing Request

Once all the supporting documents have been uploaded and published, and the details thoroughly checked, the Sourcing Request must be submitted to Procurement. **If this step is missed, Procurement will not see it!**

**REMINDER:** 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 [Replace Documents](#) section on page 10. 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 ([Submit 'ProcType' Sourcing Request to Procurement](#)) 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. Attachments are **always** added via the **Documents** tab.
6. Step 4: Click **Submit**.

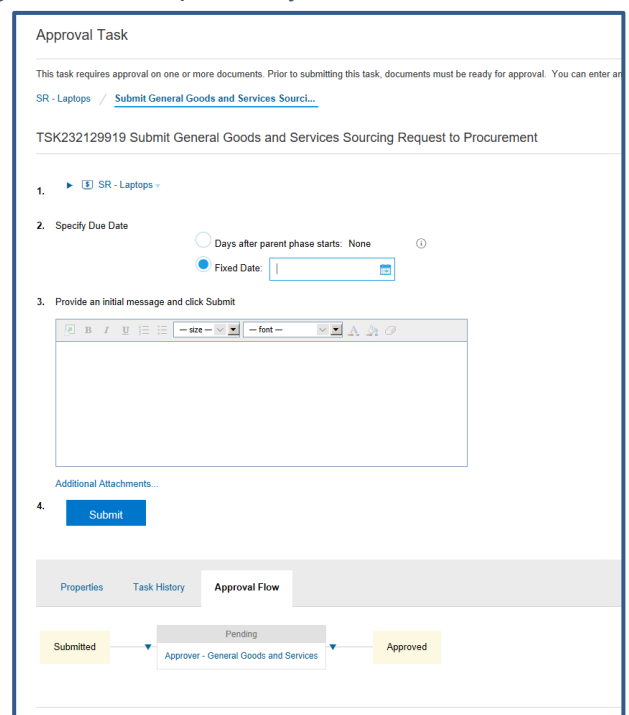


Figure 6

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



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**NOTE:** This is a good way to check to see if the Sourcing Request has been submitted to Procurement.

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### 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 checkmark beside it. This means the Sourcing Request 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 an 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 ensure any missing information or documents are added.
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.

## 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 Request. These fields can be navigated using keywords and/or drilling down using the dropdown arrows.

### Use Keywords

1. Navigate to the relevant field (*Commodity* or *Division/Dept./Region*).
2. Start typing the Commodity or Division/Dept/Region name and click **Search More** (Figures A1 & A2).
3. Drill down if necessary, by clicking the ► symbol to expand.
4. Check the box beside the required Commodity or Division / Dept /Region (Figures A3 & A4).
5. Click **Done**.

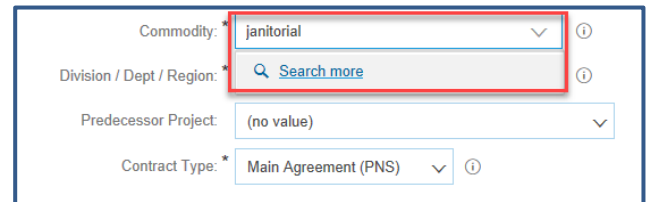


Figure A 1 shows a screenshot of the Overview Form. The 'Commodity' field is set to 'janitorial'. Below it, the 'Division / Dept / Region' field has a 'Search more' button highlighted with a red box. Other fields include 'Predecessor Project' (no value) and 'Contract Type' (Main Agreement (PNS)).

Figure A 1

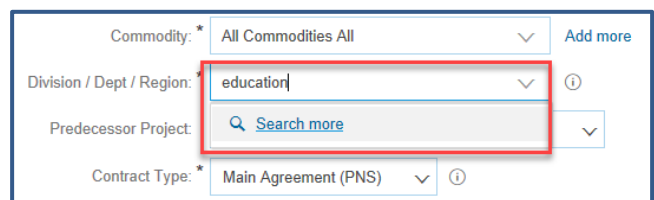


Figure A 2 shows a screenshot of the Overview Form. The 'Division / Dept / Region' field is set to 'education'. Below it, the 'Predecessor Project' field has a 'Search more' button highlighted with a red box. Other fields include 'Commodity' (All Commodities All) and 'Contract Type' (Main Agreement (PNS)).

Figure A 2

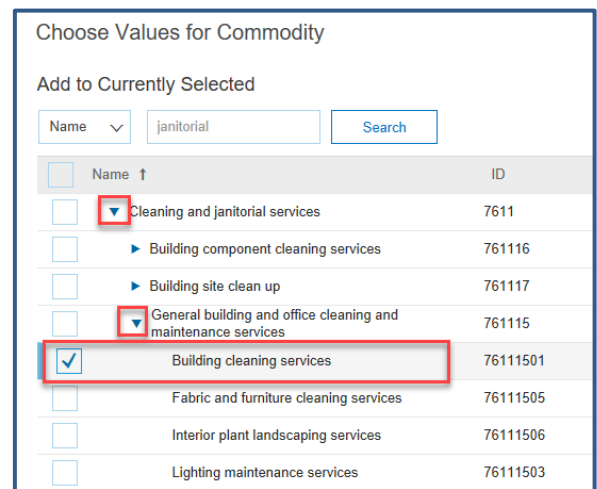


Figure A 3 shows a screenshot of the 'Choose Values for Commodity' dialog box. The 'Add to Currently Selected' section has a search box with 'janitorial' and a 'Search' button. Below is a table of commodity options:

<input type="checkbox"/>	Name ↑	ID
<input type="checkbox"/>	▼ Cleaning and janitorial services	7611
<input type="checkbox"/>	▶ Building component cleaning services	761116
<input type="checkbox"/>	▶ Building site clean up	761117
<input type="checkbox"/>	▼ General building and office cleaning and maintenance services	761115
<input checked="" type="checkbox"/>	Building cleaning services	76111501
<input type="checkbox"/>	Fabric and furniture cleaning services	76111505
<input type="checkbox"/>	Interior plant landscaping services	76111506
<input type="checkbox"/>	Lighting maintenance services	76111503

Figure A 3

Choose Values for Division / Dept / Region

Add to Currently Selected

Function  Search

Function ↑	ID
<input type="checkbox"/> All	All
<input type="checkbox"/> ▶ Agencies and Commissions	400000
<input type="checkbox"/> IWK	500001
<input type="checkbox"/> ▶ Nova Scotia Health Authority	200000
<input type="checkbox"/> ▶ Nova Scotia School Boards	300000
<input type="checkbox"/> ▼ Province of Nova Scotia	100000
<input type="checkbox"/> Agriculture	100101
<input checked="" type="checkbox"/> Business	100102
<input type="checkbox"/> Communities, Culture and Heritage	100103
<input type="checkbox"/> Community Services	100104
<input type="checkbox"/> Education and Early Childhood Development	100105
<input type="checkbox"/> Energy and Mines	100106
<input type="checkbox"/> Environment	100107
<input type="checkbox"/> Finance and Treasury Board	100108
<input type="checkbox"/> Fisheries and Aquaculture	100109
<input type="checkbox"/> Health and Wellness	100110
<input type="checkbox"/> Intergovernmental Affairs	100111

Currently Selected

Function ↑	ID
<input checked="" type="checkbox"/> Business	100102

Done

Figure A 4

## Drill 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 Division/ Dept/ Region, 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 **at the lowest level (Branch level)** (Figures A3 & A4)).
6. Click **Done**.



**You will not be able to select the parent categories at Division level (any ending in 000), such as the Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards. You must select the lowest level, that is, the branch level specific to your department.**

## Replace 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 A5). The Replace Document screen appears (Figure A6).

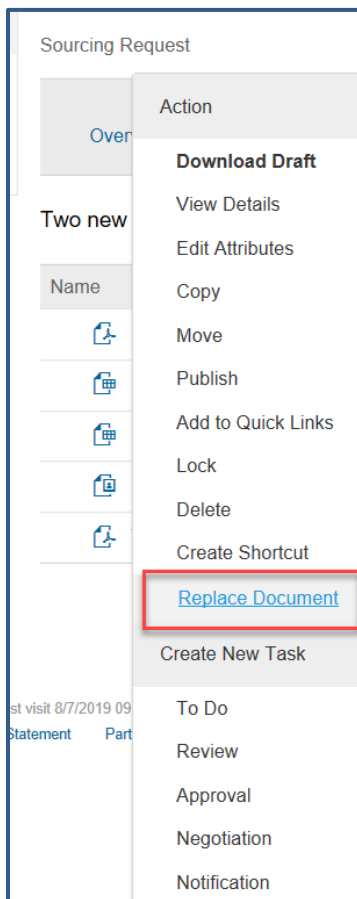


Figure A 5

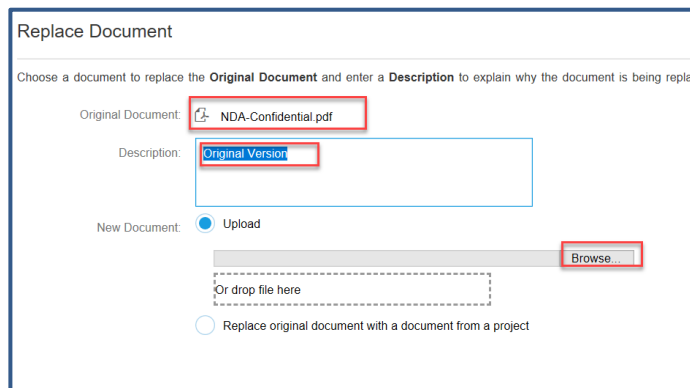


Figure A 6

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 A7). This shows the name of the document, description, status, version number, version comment etc.

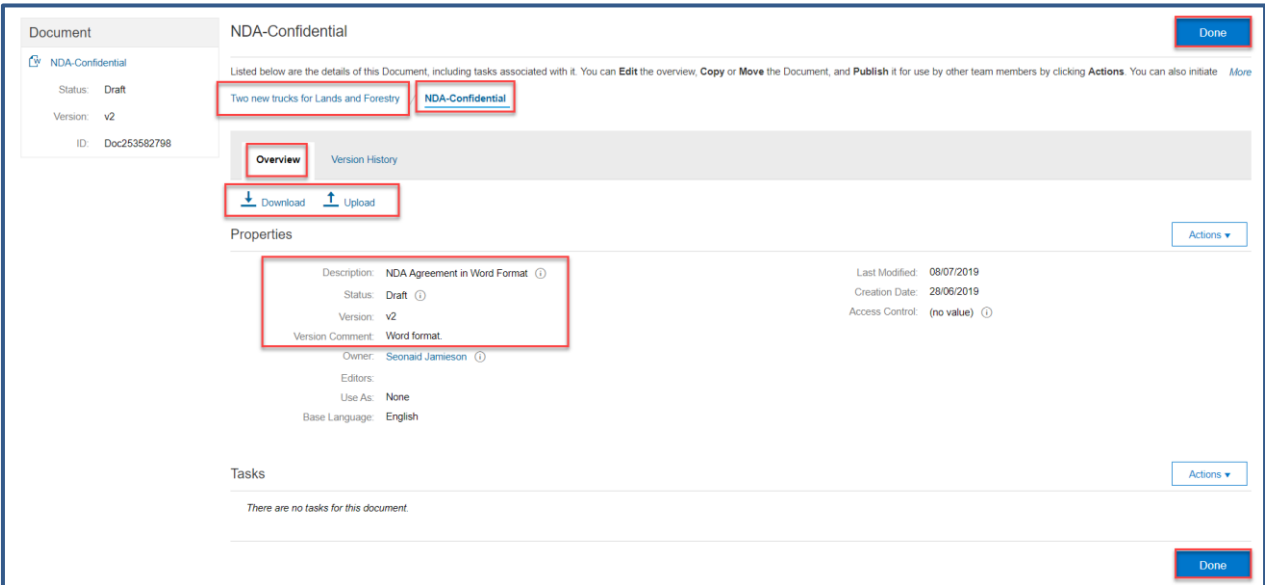


Figure A 7

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

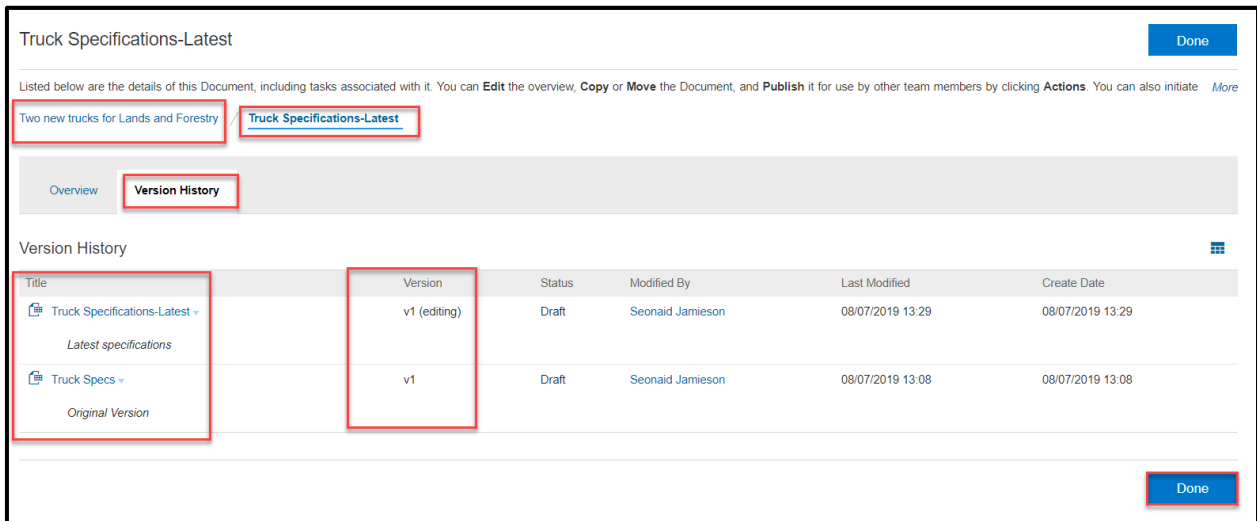


Figure A 8

In Figure A8 above the document name has been changed but the version is still version 1. In Figure A9 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 ▾ <i>Wrong file uploaded originally.</i>	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 ▾ <i>Original Version</i>	v1	Draft	Seonaid Jamieson	25/04/2019 11:24	25/04/2019 11:24

Figure A 9

## Additional Help & Resources

For additional help and training in Ariba, please contact [Procurement Support](#) to submit a ticket or call the support line at 902-424-5770.

## Document Information

### Revision History

Date	Version	Author/Editor	Requestor	Description
October 13, 2021	1.0	Kamia Creelman	Seonaid MacFarlane	Split Sourcing & Contract Request Guide into two references