SAP Ariba Implementation Project

Department of Shared Administrative Services

Office of State Procurement

Sourcing in SAP Ariba: Pre-Purchase Requisition (PR) Approvals

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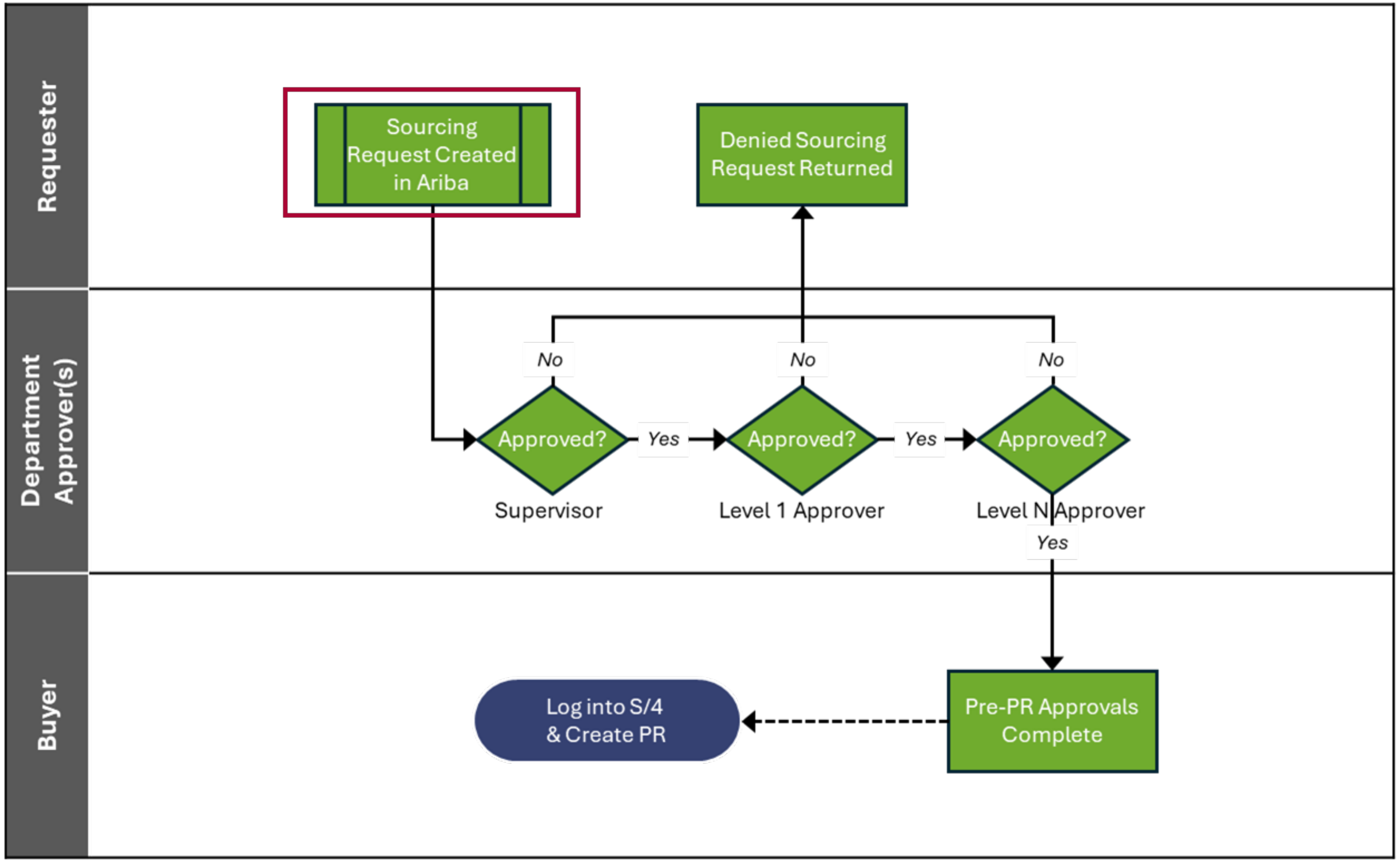
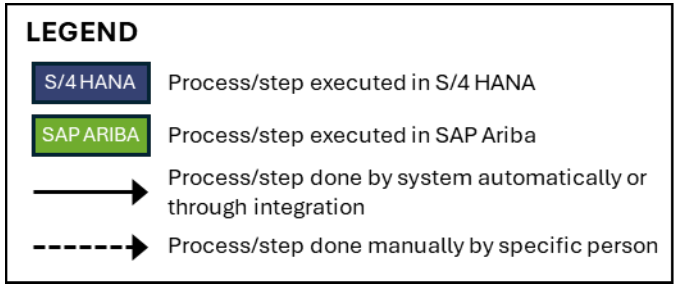
Process Flow, Submit Sourcing Request

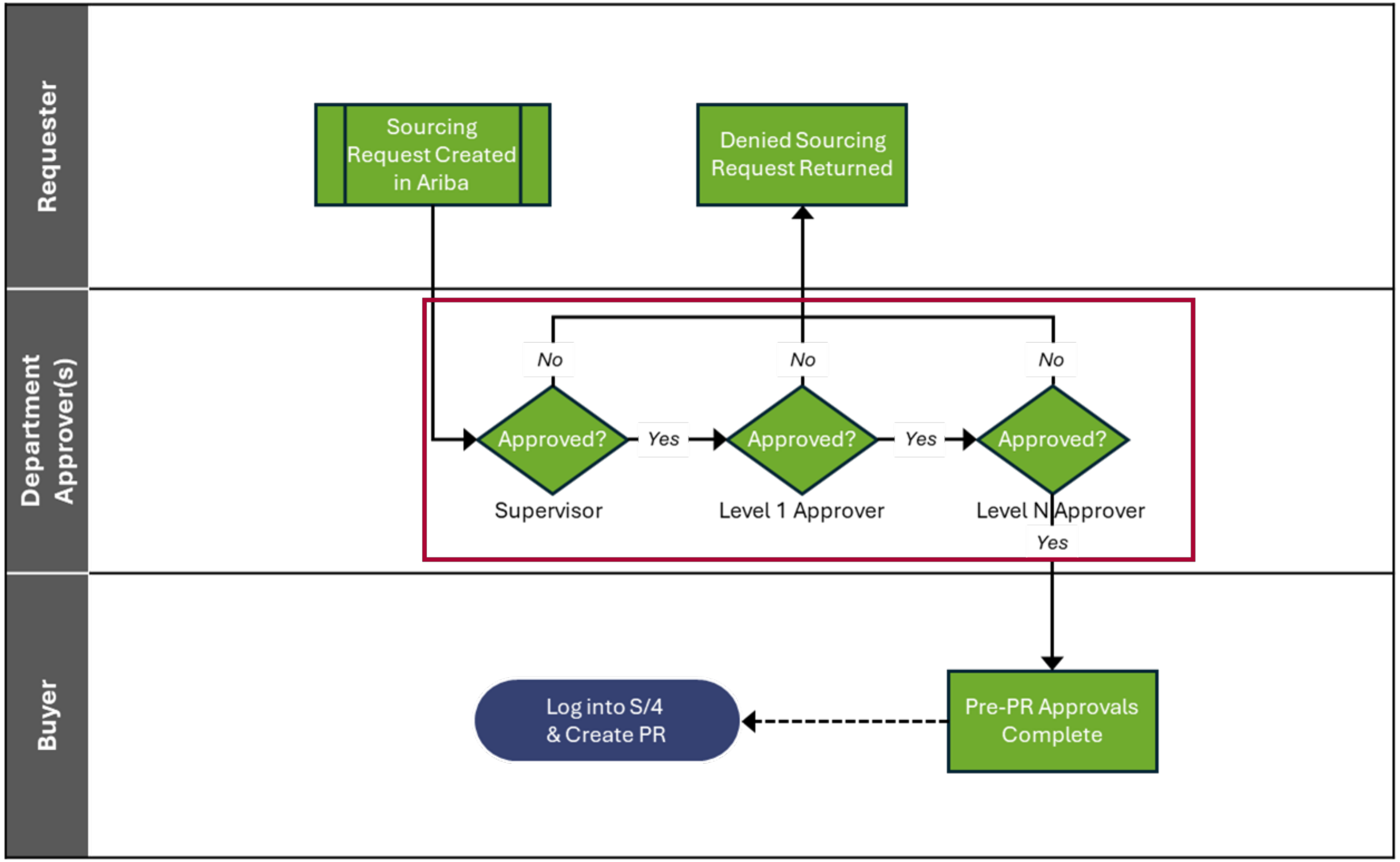
Target Audience: Requesters
Purpose: Submission of Ariba Sourcing Request (SR)





Process Flow, Review & Approve Sourcing Request

Target Audience: Approvers (Supervisor, Delegate)
Purpose: Approval of Ariba Sourcing Request (SR)



LEGEND

S/4 HANA	Process/step executed in S/4 HANA
SAP ARIBA	Process/step executed in SAP Ariba
→ (solid arrow)	Process/step done by system automatically or through integration
- - -→ (dashed arrow)	Process/step done manually by specific person

Process Guidance

When will the Pre-Purchase Requisition (PR) Approvals process be used?

- Most State Agencies/Departments have approvals and other actions that must be done BEFORE a Purchase Requisition (PR) is created in AASIS (current ERP system).
- Currently, many of these approvals are being done via email or even by physically walking hard-copy documents around from office to office.
- As such, the Pre-PR Approvals process has been developed to enable Department approvals that are required BEFORE a PR is created to be completed in a more efficient and effective way using SAP Ariba functionality and workflow.

Key Terminology

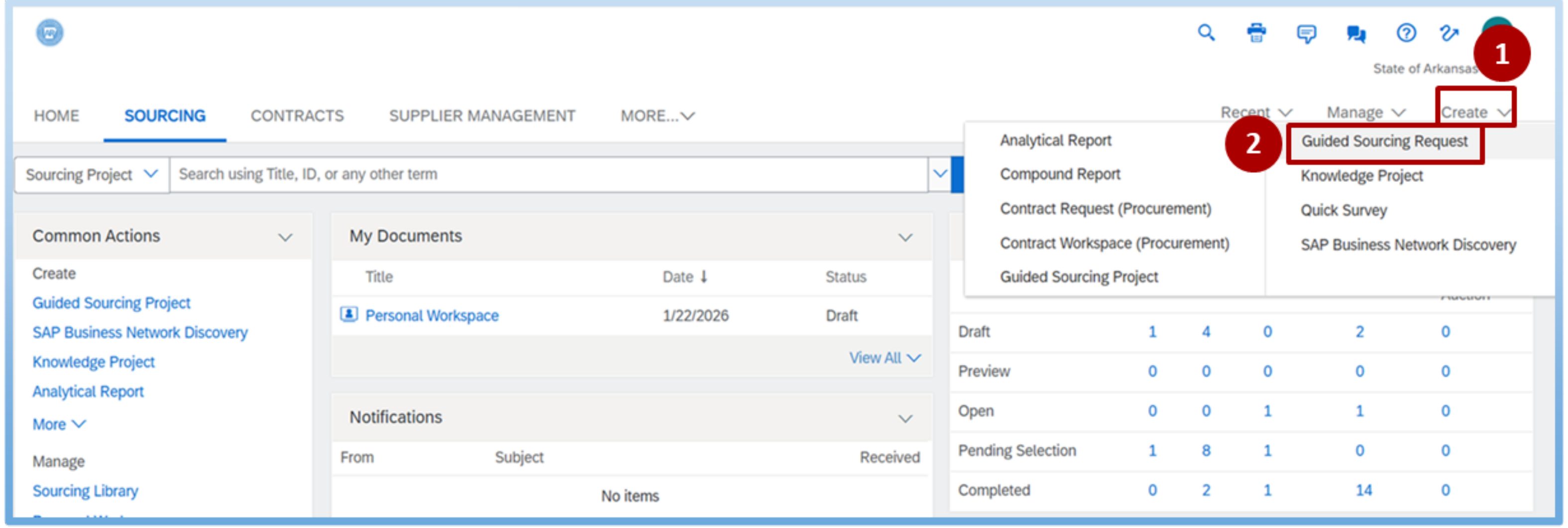
- **Ariba Sourcing Request (SR):** An intake form in SAP Ariba Sourcing used to capture the business need and key details required to initiate a sourcing effort (e.g., run a solicitation, collect responses, negotiate, and award a supplier).
- **Approval Flow (Workflow):** The configured set of approvers and rules (often based on spend threshold, category, region, or risk) required to move the SR forward.
- **Template:** A predefined structure that can auto-populate tasks, documents, approval flows, and event settings once the SR is created/approved.

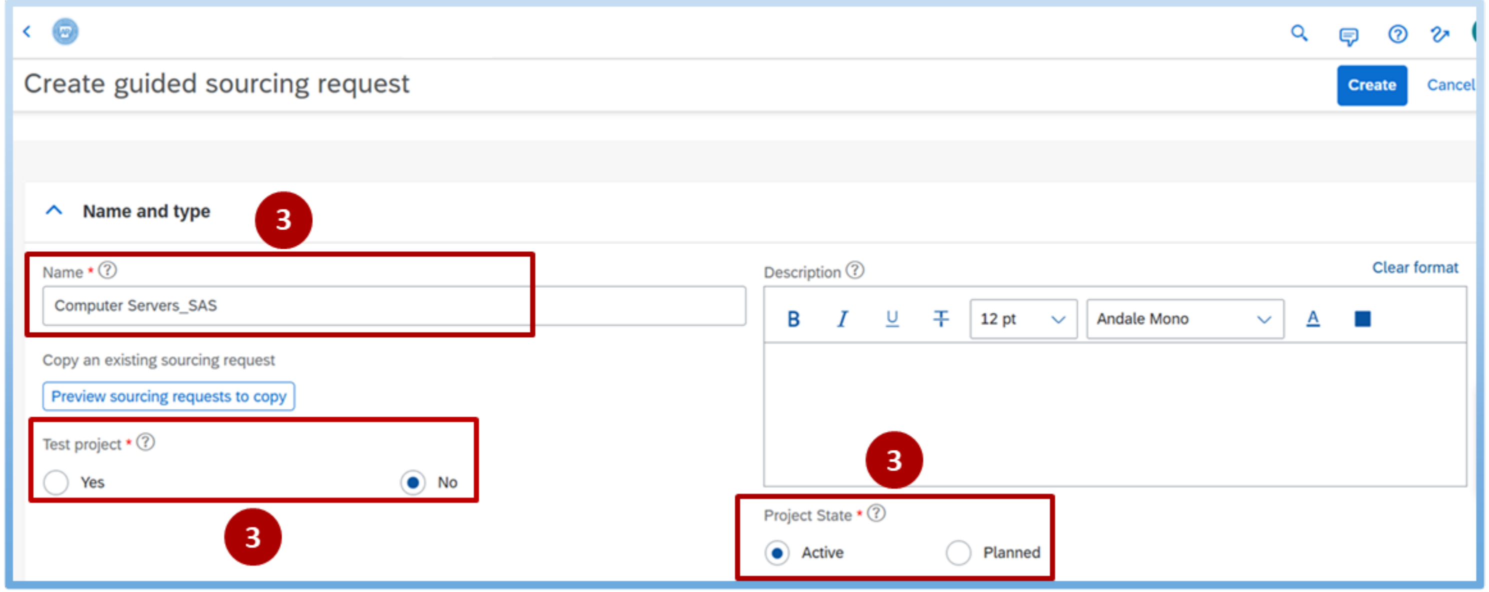
Submit Ariba Sourcing Request (SR)

Submit Ariba Sourcing Request (SR) (1 of 8)

Action: Create SR (in SAP Ariba)
Role: Requester

Step	Action Taken
1	From the main menu, select **Create**.
2	Select **Guided Sourcing Request**.
3	Complete **all required fields** (marked with asterisks) in the **Name and Type** section, as follows: • **Name** • **Test Project NOTE:** *This field should always be set to* ***No*** • **Project State**

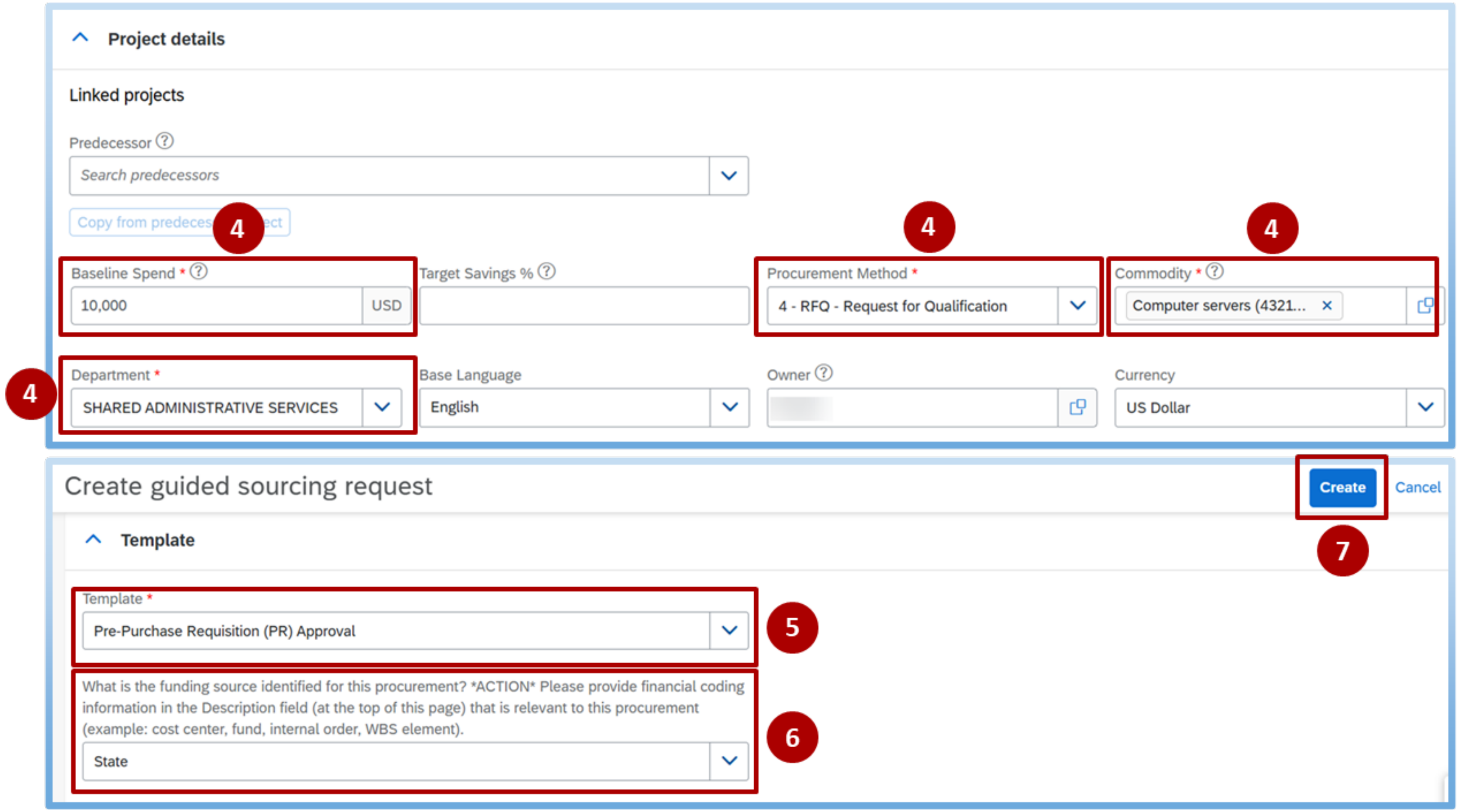




Submit Ariba Sourcing Request (SR) (2 of 8)

Action: Create SR (in SAP Ariba)
Role: Requester

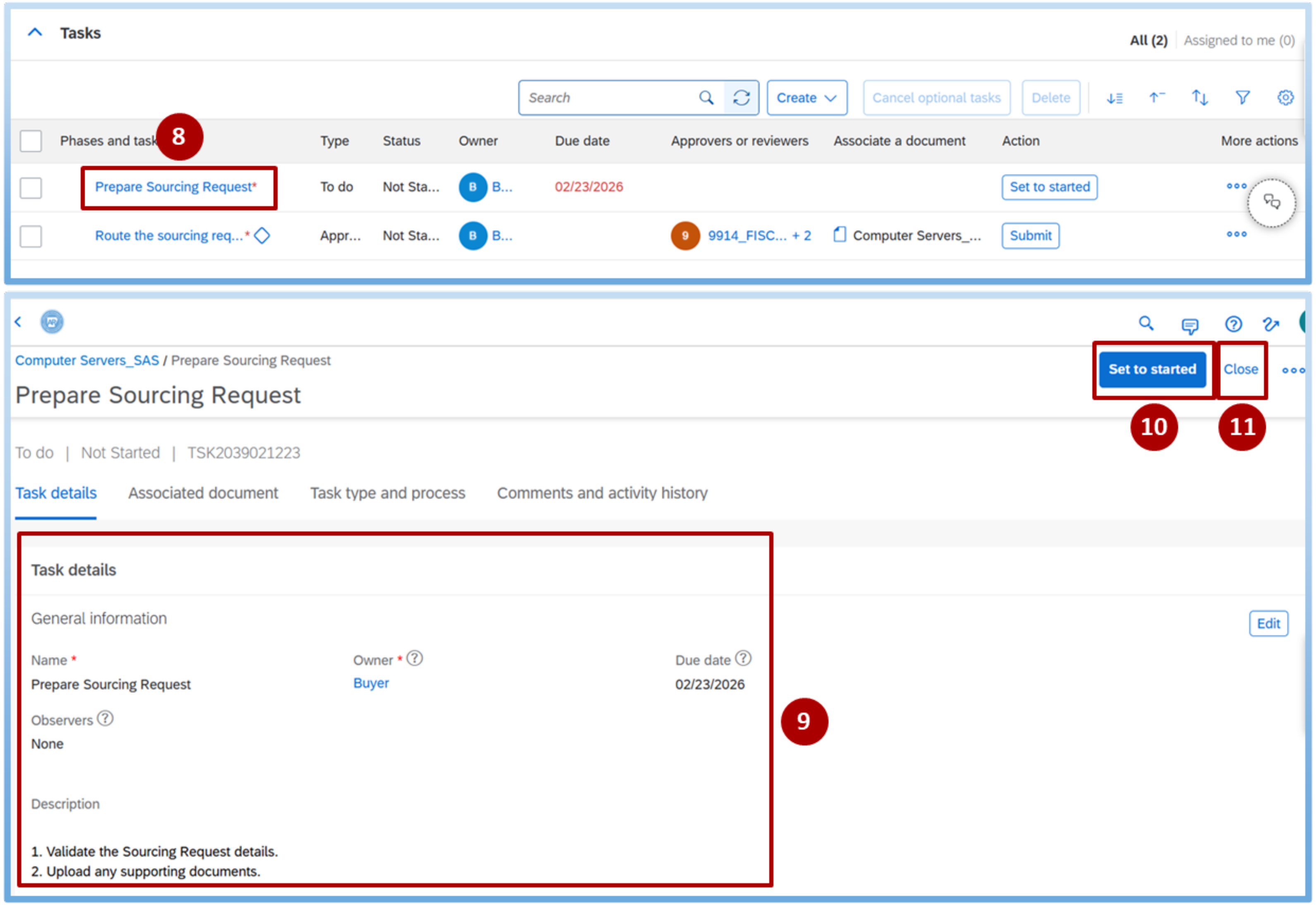
Step	Action Taken
4	Complete **all required fields** (marked with asterisks) in the **Project Details** section, as follows: • **Baseline Spend** • **Procurement Method** • **Commodity** • **Department**
5	In the **Template section**, select **State of Arkansas Guided Sourcing Request for Offline Approver** from the drop-down list.
6	Choose the **funding source**.
7	Click **Create**.



Submit Ariba Sourcing Request (SR) (3 of 8)

Action: Create SR (in SAP Ariba)
Role: Requester

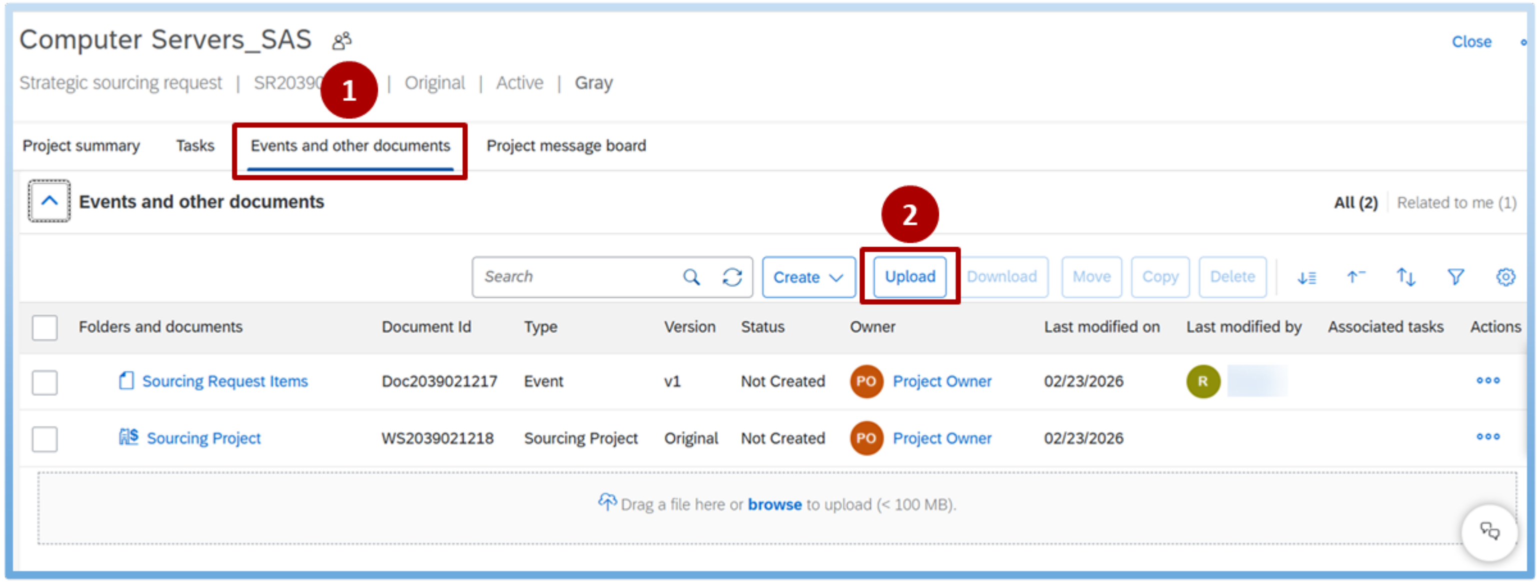
Step	Action Taken
8	Go to the **Tasks section** and click on **Prepare the Sourcing Request** task.
9	Review the **Task Details**.
10	Click **Set to Started**.
11	Click **Close**.

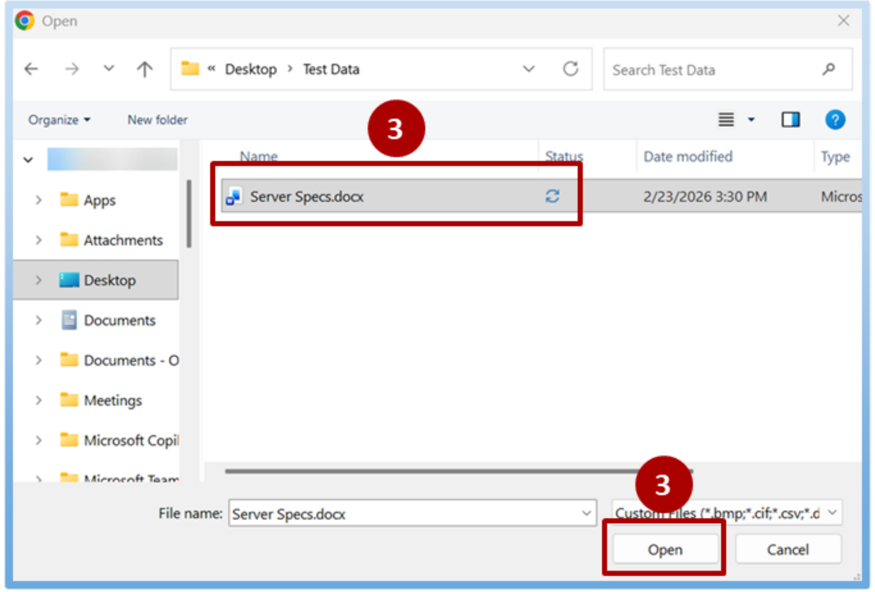


Submit Ariba Sourcing Request (SR) (4 of 8)

Action: Add Supporting Documents
Role: Requester

Step	Action Taken
1	Navigate to and click the **Event and Other Documents** tab.
2	Click **Upload**.
3	Navigate to and select the **documents** from your local drive and click **Open**. Repeat until all documents are uploaded. **NOTE**: *Specific documents to be uploaded here will be Department-specific and depend on the good or service being requested. Refer to current operating standards for further guidance.*

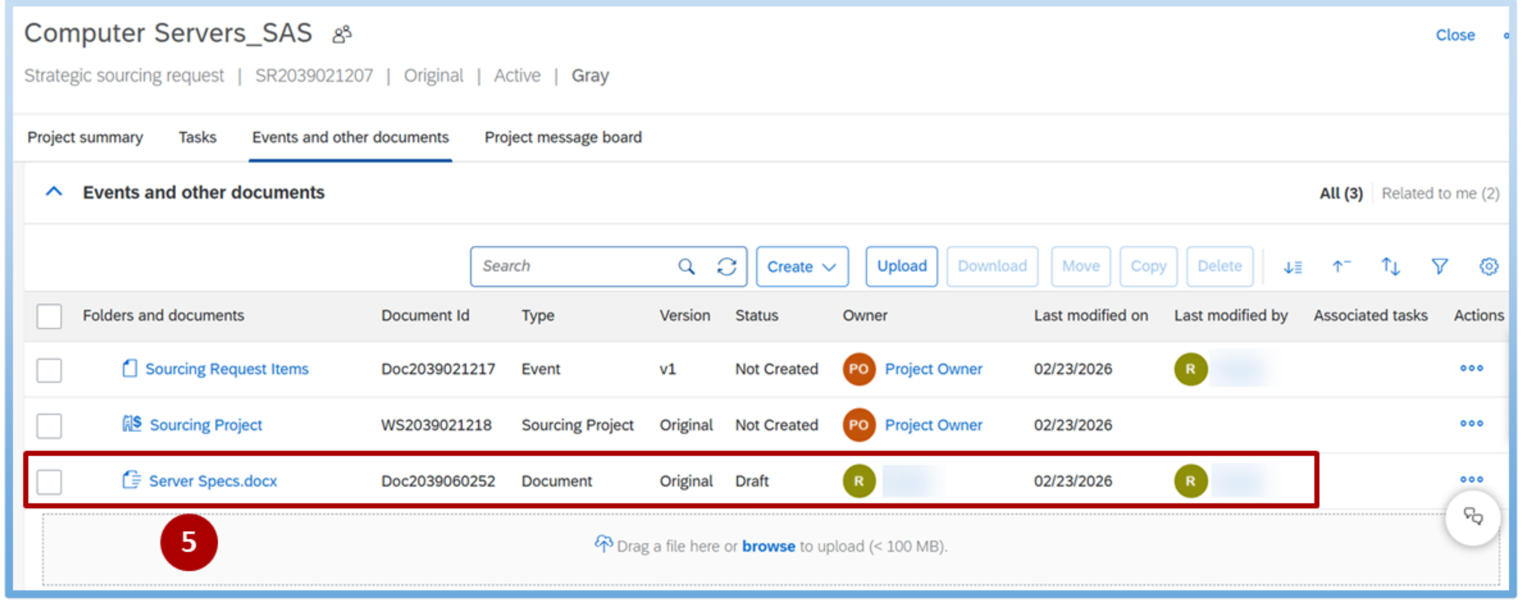


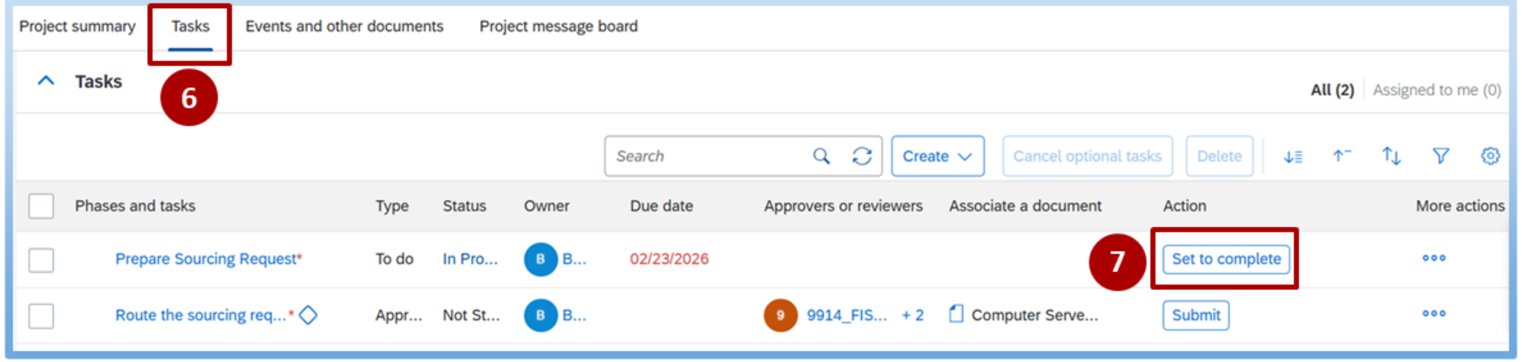


Submit Ariba Sourcing Request (SR) (5 of 8)

Action: Add Supporting Documents
Role: Requester

Step	Action Taken
5	Confirm the document(s) are added.
6	Scroll back to the **Tasks** section.
7	For the **Prepare Sourcing Request** task, click **Set to Complete**.

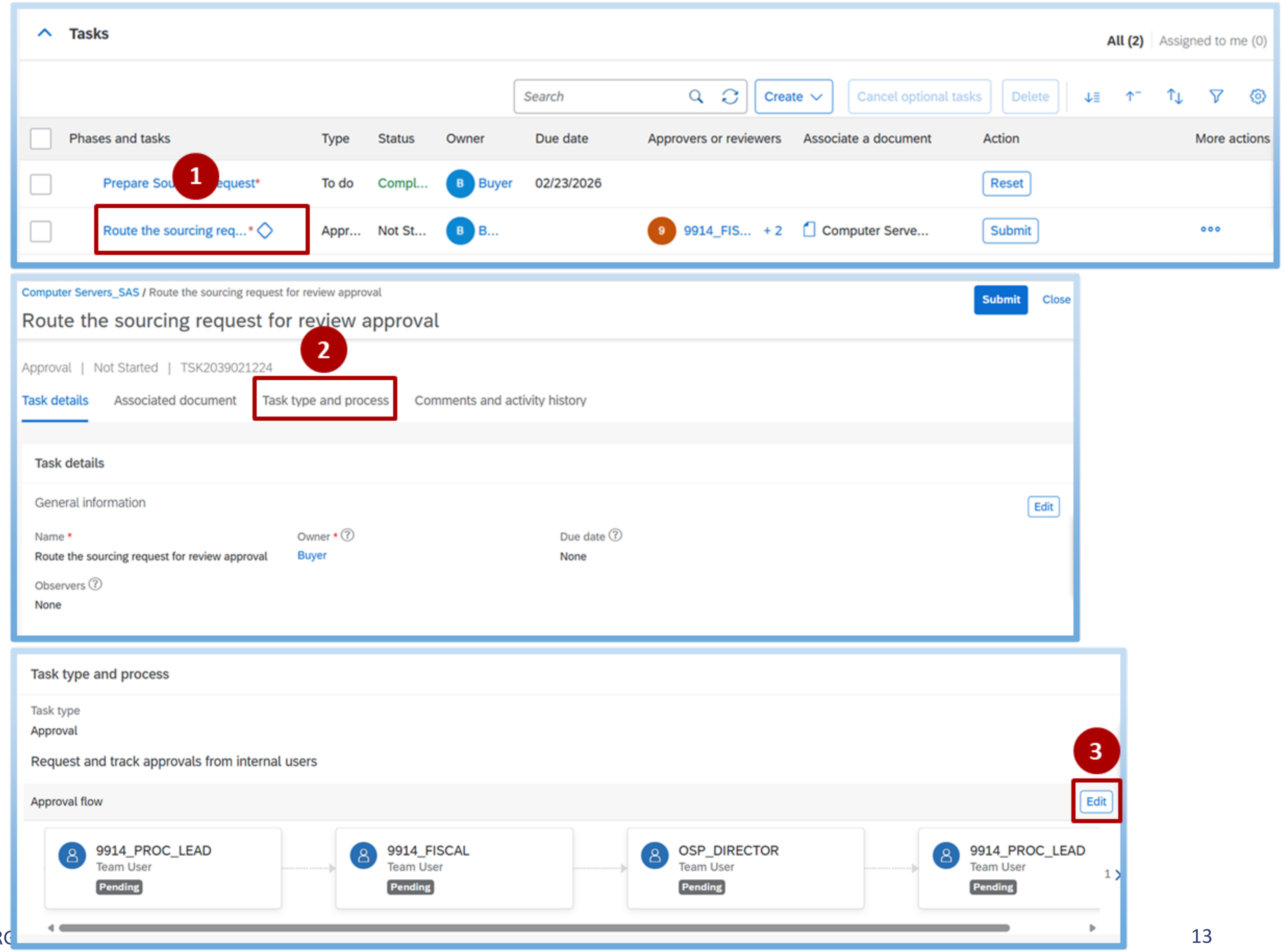




Submit Ariba Sourcing Request (SR) (6 of 8)

Action: Validate Workflow and Add Additional Reviewer (if needed)
Role: Requester

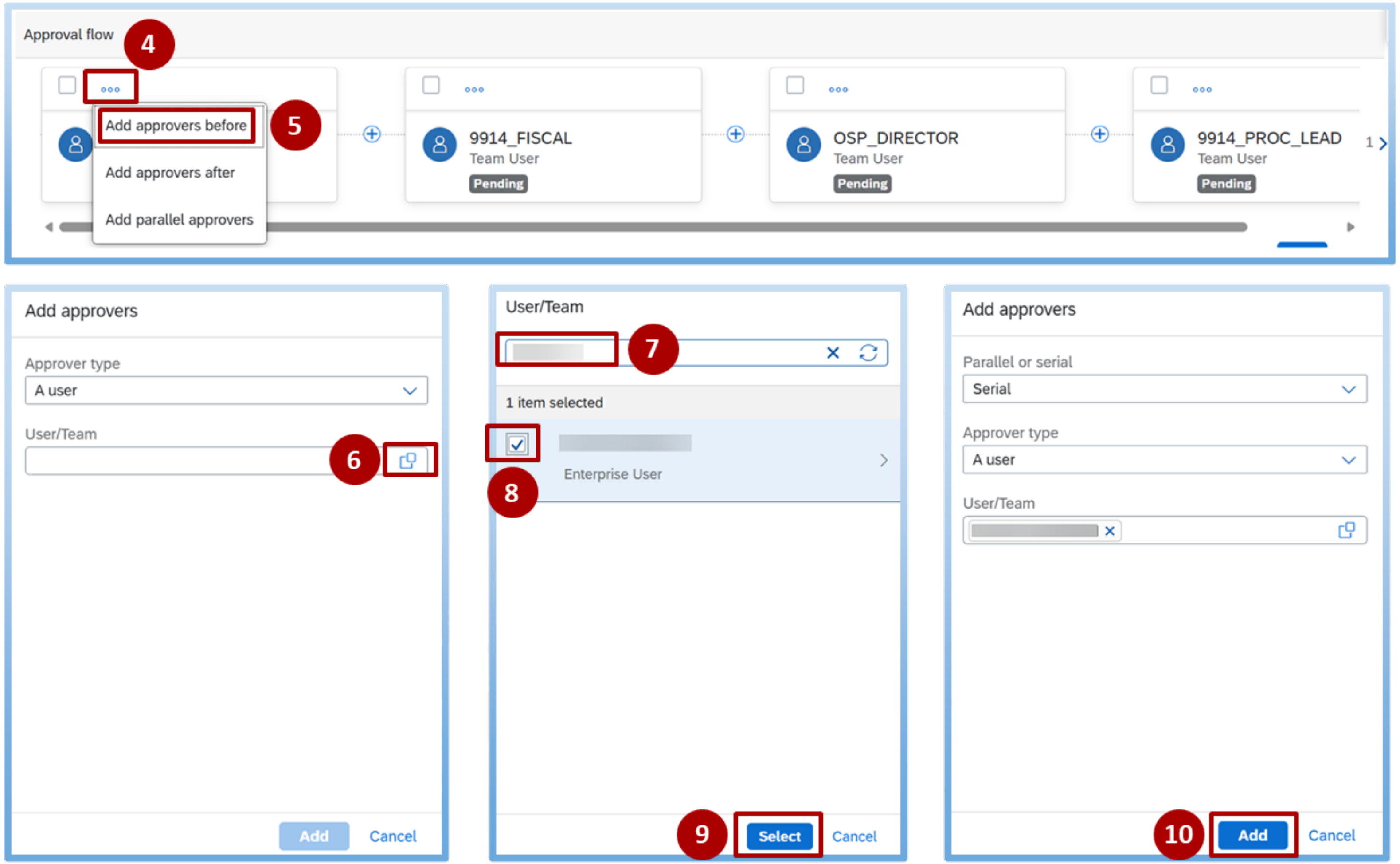
Step	Action Taken
1	To review the approval workflow for the sourcing request, click the **Route the Sourcing Request for Review Approval** task.
2	Click the **Task Type and Process** tab to view the planned **Approval Flow**. Review the assigned approvers, as needed.
3	To add an additional approver (e.g., a supervisor after the first approver), click **Edit** in the **Approval Flow**.



Submit Ariba Sourcing Request (SR) (7 of 8)

Action: Validate Workflow and Add Additional Reviewer (if needed)
Role: Requester

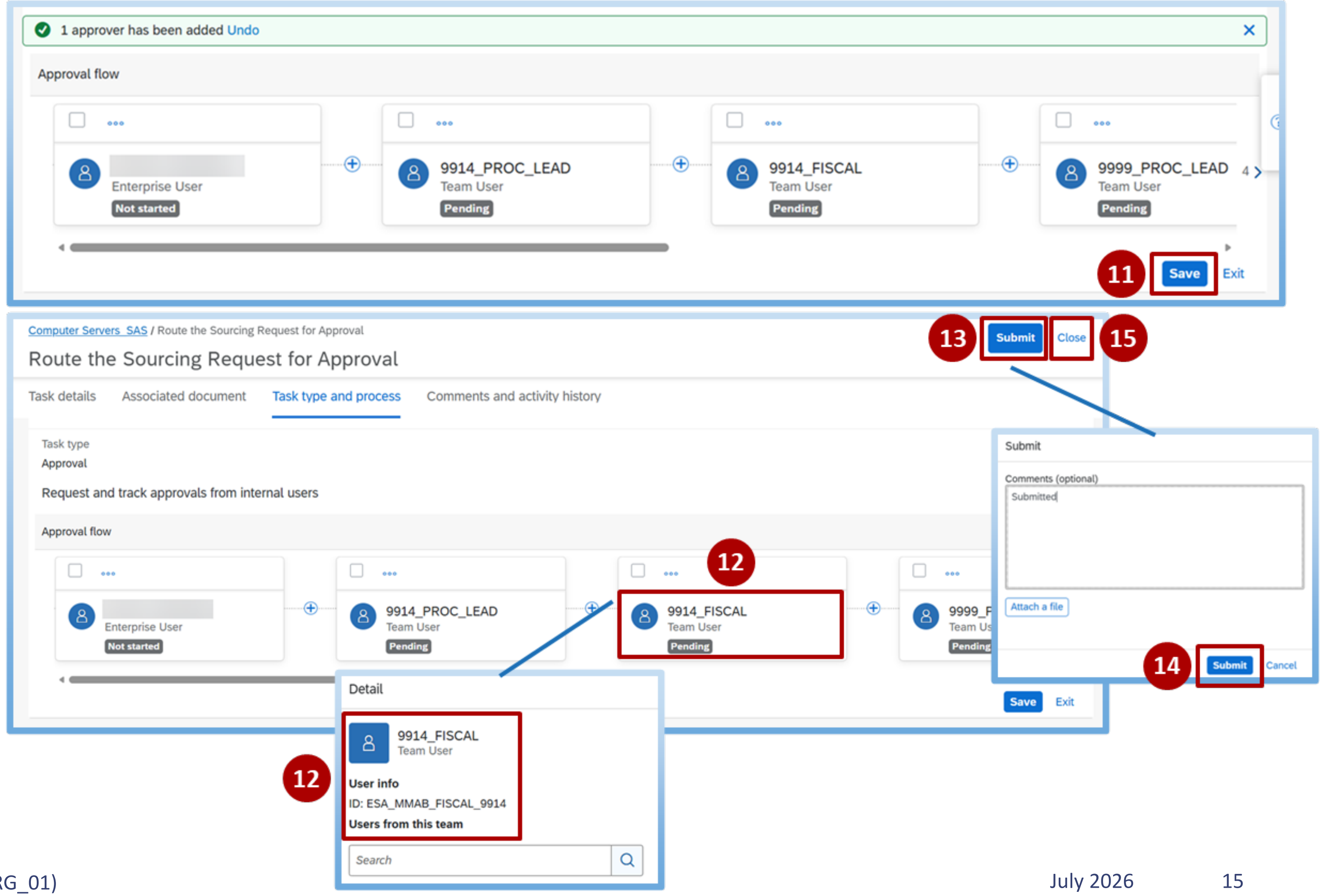
Step	Action Taken
4	Scroll to the first node and click the **3-dots** above the node.
5	Click the **Add Approvers Before** option.
6	In the pop-up, keep **A User** as-is, then click the **two-square icon** in the **User/Team** field.
7	Type the *Approver Name* in the **Search** field. Results automatically populate.
8	Select the **Approver** by clicking the **checkbox**.
9	Click **Select**. The selected user populates in the **User/Team** field.
10	Click **Add**. The added approver now displays in the **Approval Flow**.



Submit Ariba Sourcing Request (SR) (8 of 8)

Action: Validate Workflow and Add Additional Reviewer (if needed)
Role: Requester

Step	Action Taken
11	Click **Save**.
12	Review all **required approvers** from left to right by clicking **each node** to view user IDs. Add additional reviewers, as needed.
13	Click **Submit** button at the top right of the screen.
14	Click **Submit** once again on pop-up screen.
15	Click **Close**.

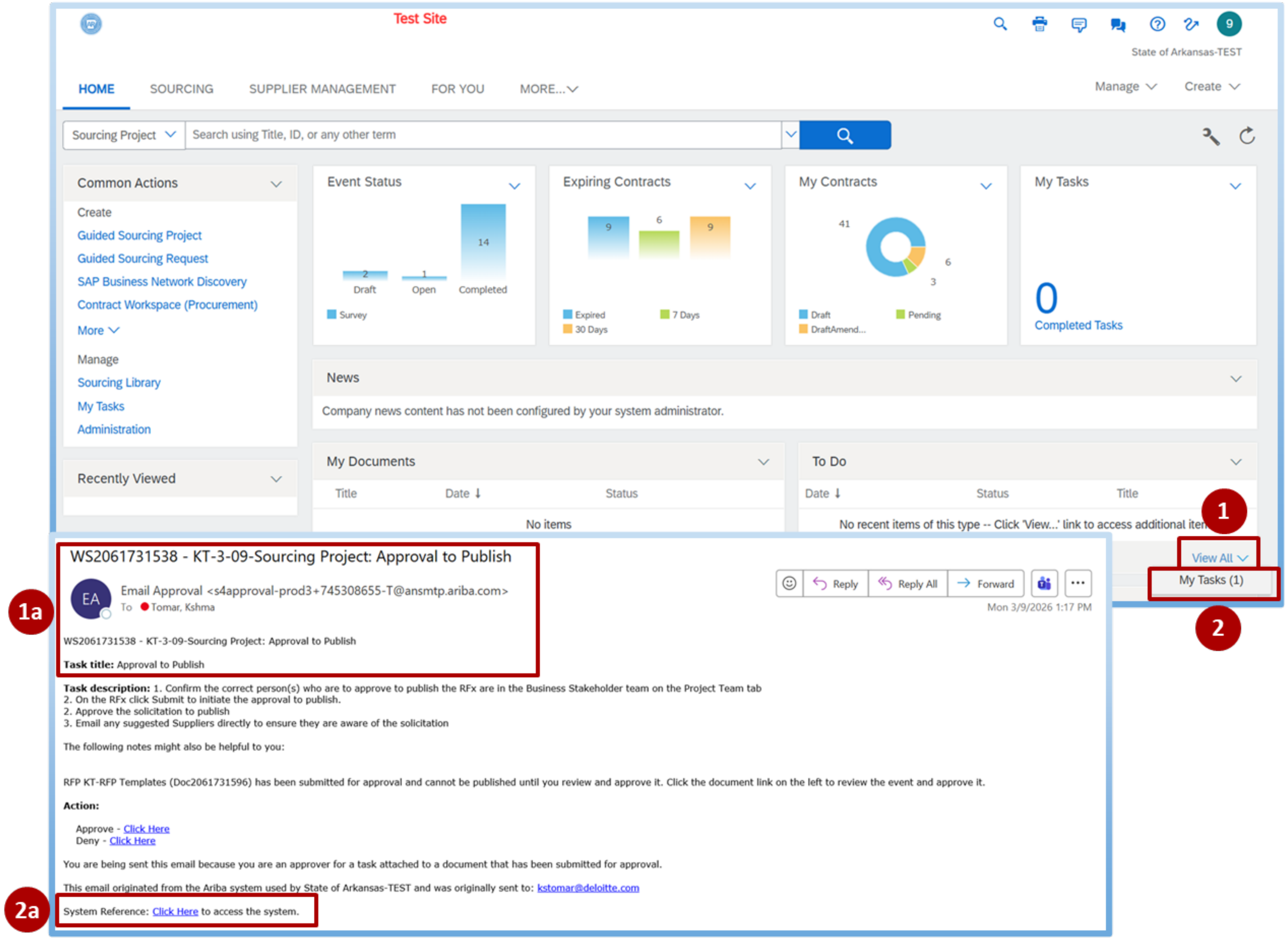


Review & Approve Ariba Sourcing Request (SR)

Review & Approve Ariba Sourcing Request (SR) (1 of 4)

Action: Review & Approve Ariba SR
Role: Approver (Supervisor, Delegate)

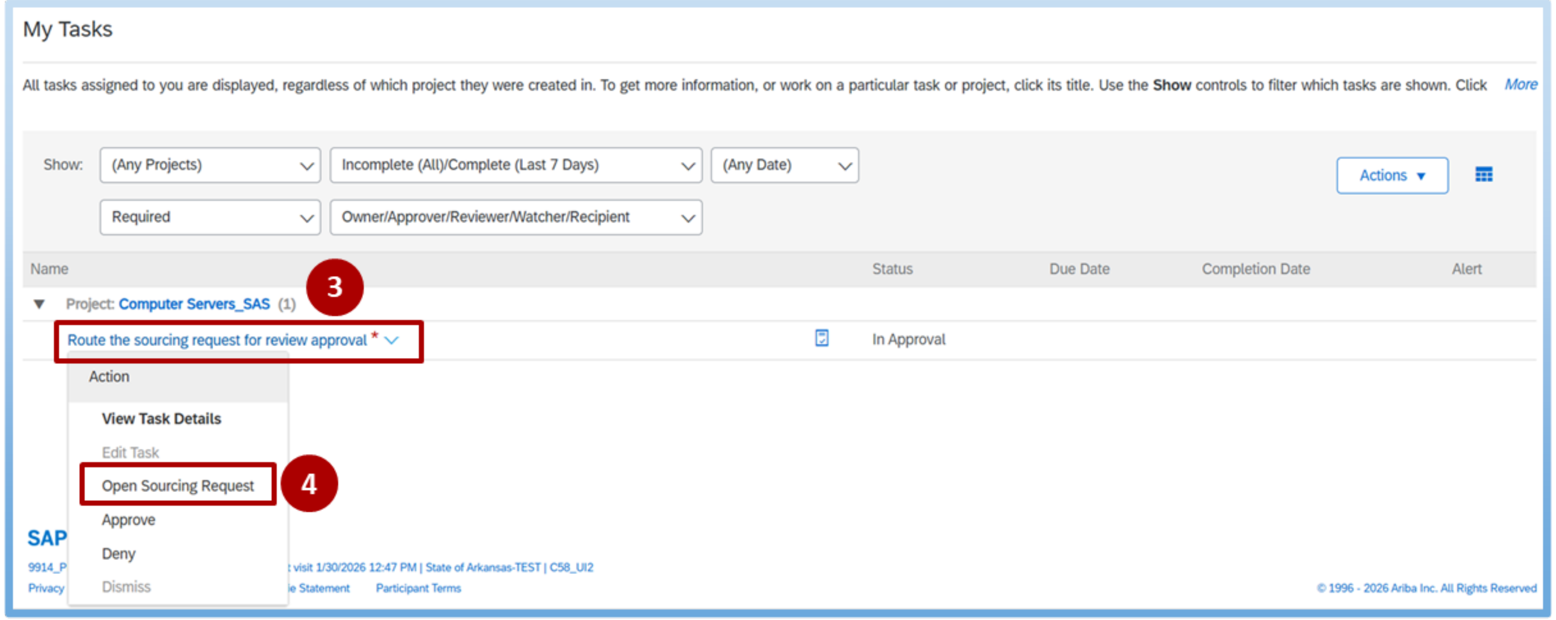
Step	Action Taken
1	On the **Ariba Homepage**, navigate to the **To-Do** section, click **View All**.
2	Select **My Tasks**.
1a	Alternatively, approvers receive an **SR approval notification** via email.
2a	Click to the **System Reference: Click Here to Access the System** link to go to the SR approval task.

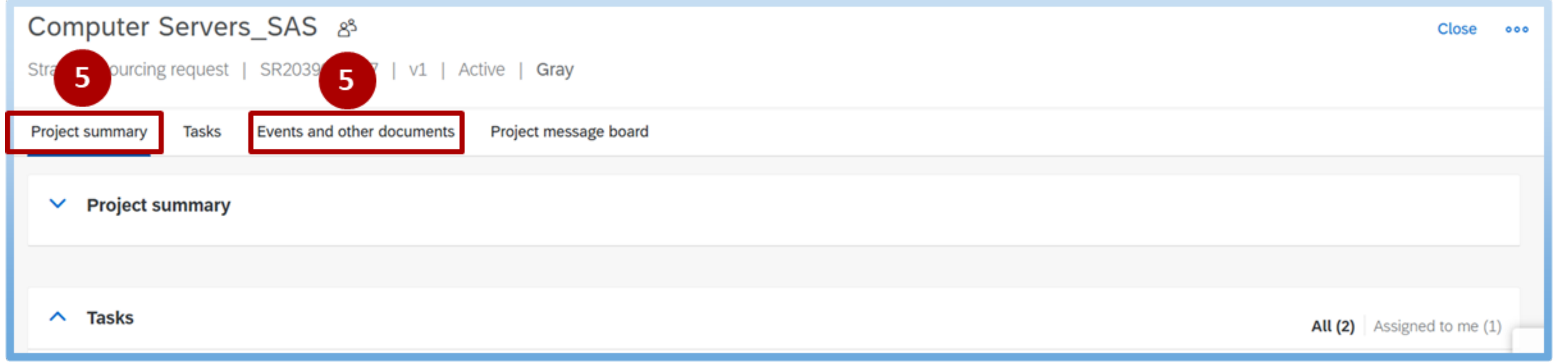


Review & Approve Ariba Sourcing Request (SR) (2 of 4)

Action: Review & Approve Ariba SR
Role: Approver (Supervisor, Delegate)

Step	Action Taken
3	Review the list for the **appropriate transaction** name and **click it** once found.
4	Click **Open Sourcing Request** to review details.
5	Review details by clicking **Project Summary** and **Events and Other Documents**.

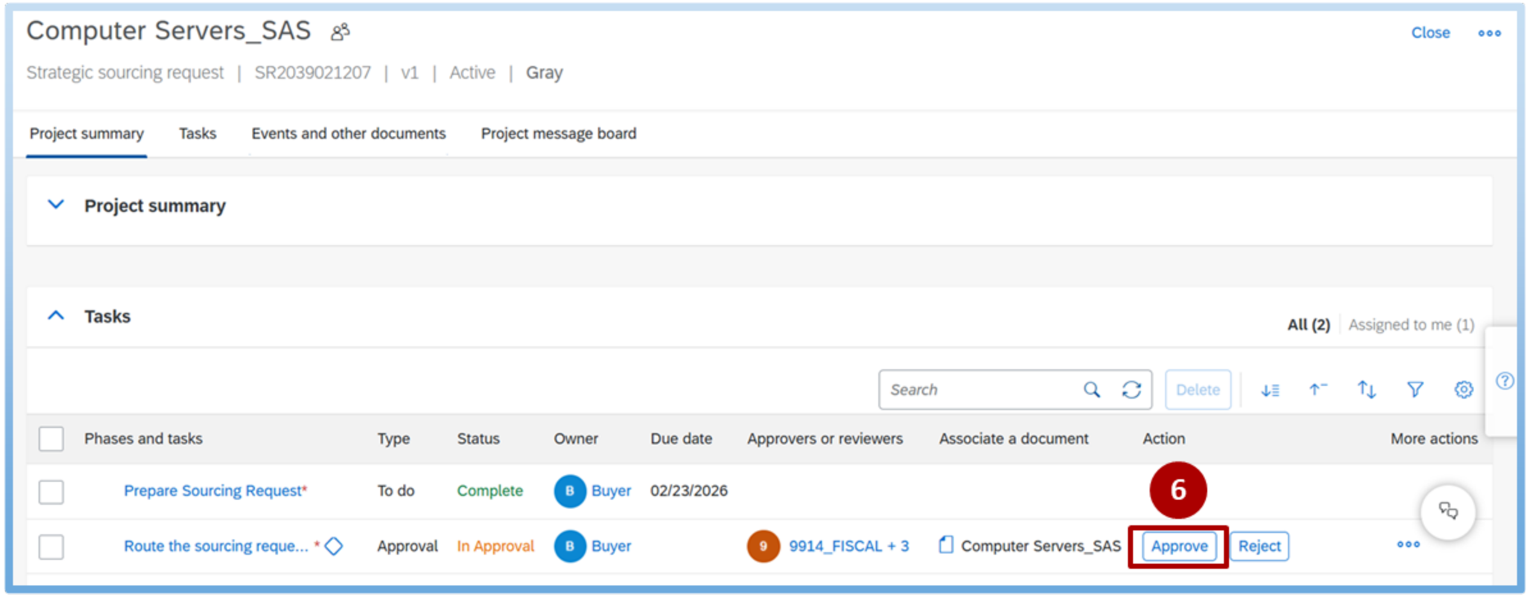




Review & Approve Ariba Sourcing Request (SR) (3 of 4)

Action: Review & Approve Ariba SR
Role: Approver (Supervisor, Delegate)

Step	Action Taken
6	In the **Tasks section**, click **Approve** in the **Action column** for the **Route the Sourcing Request for Review and Sourcing Project Creation task**. **NOTE**: *At this step, approvers can also* ***Reject*** *the Ariba Sourcing Request.*
7	Add **comments** or **attach files** if needed. **NOTE**: *If the Ariba Sourcing Request has been rejecting, approvers should add* ***comments*** *or* ***attach files*** *as well.*
8	Click **Approve**. Repeat above steps for all required approvers. **NOTE**: *To reject the Ariba SR, click* ***Reject*** *at this step instead and enter* ***Comments*** *and/or* ***attach a file****, as needed.*



Review & Approve Ariba Sourcing Request (SR) (4 of 4)

Action: Delegate Review & Approval of Ariba SR
Role: Approver (Supervisor, Delegate)

Step	Action Taken
1	**NOTE**: *As part of this process, approvals can be delegated, as follows:* Click your **user profile** at the top right of the screen.
2	Choose **Delegate Authority** from the list of options.
3	Populate the **mandatory fields**, as follows: • **Delegatee** • **Delegation Start Date** • **Delegation End Date**
4	Click **OK**. **NOTE**: *The Delegate Approver will follow the same approval steps as outlined above.*