SAP Ariba Implementation Project

Department of Shared Administrative Services

Office of State Procurement

Sourcing in SAP Ariba: Sourcing Request Evaluation

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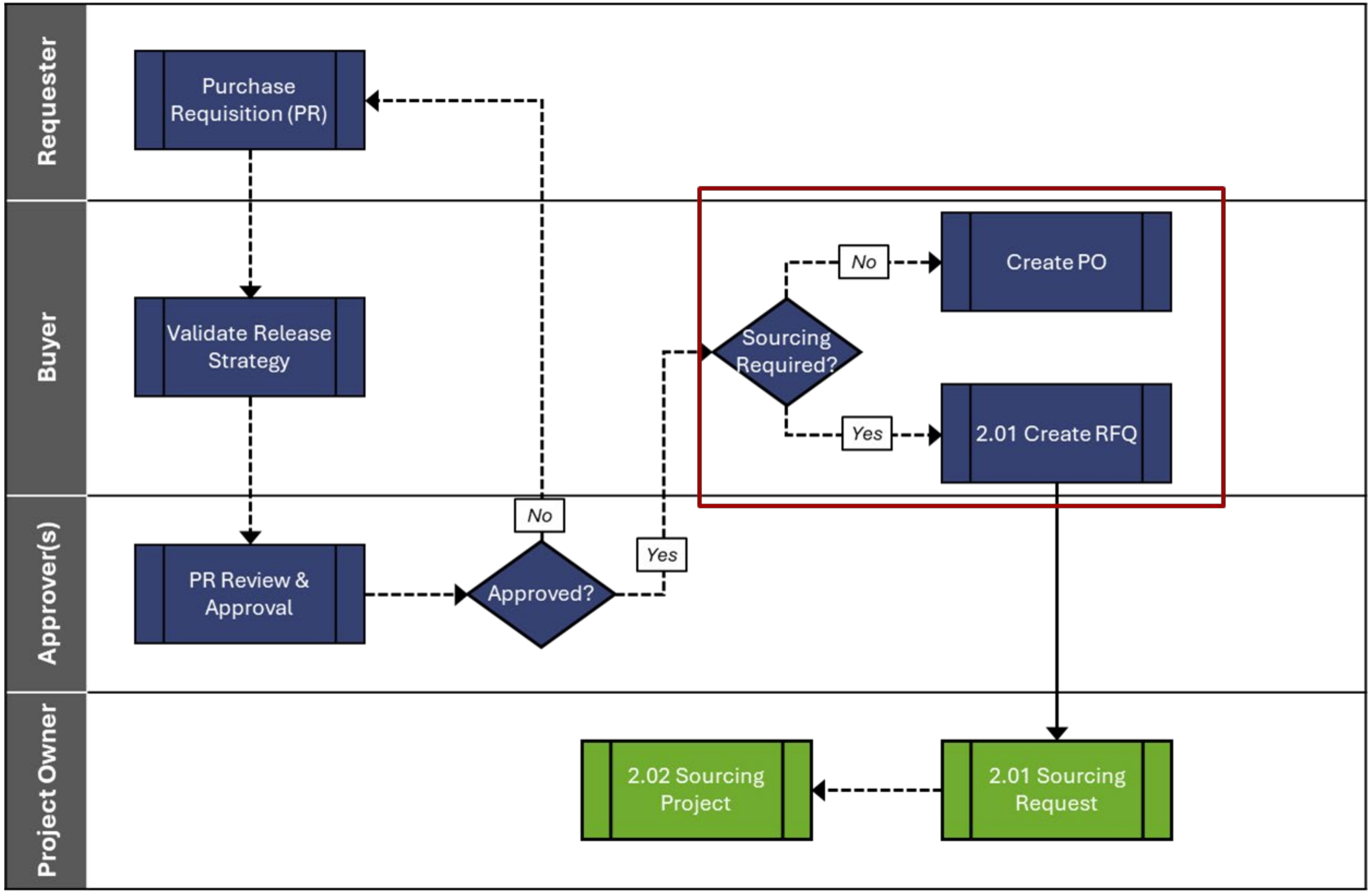
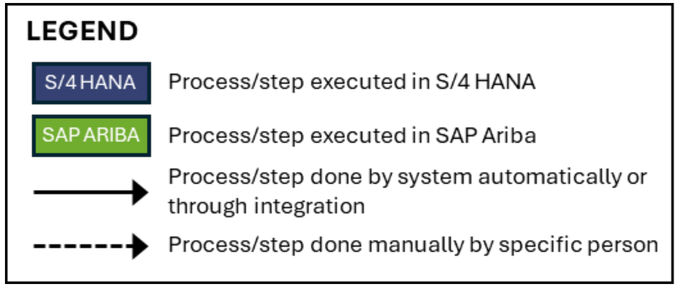
Process Flow, Evaluate S/4 PR & Create RFQ

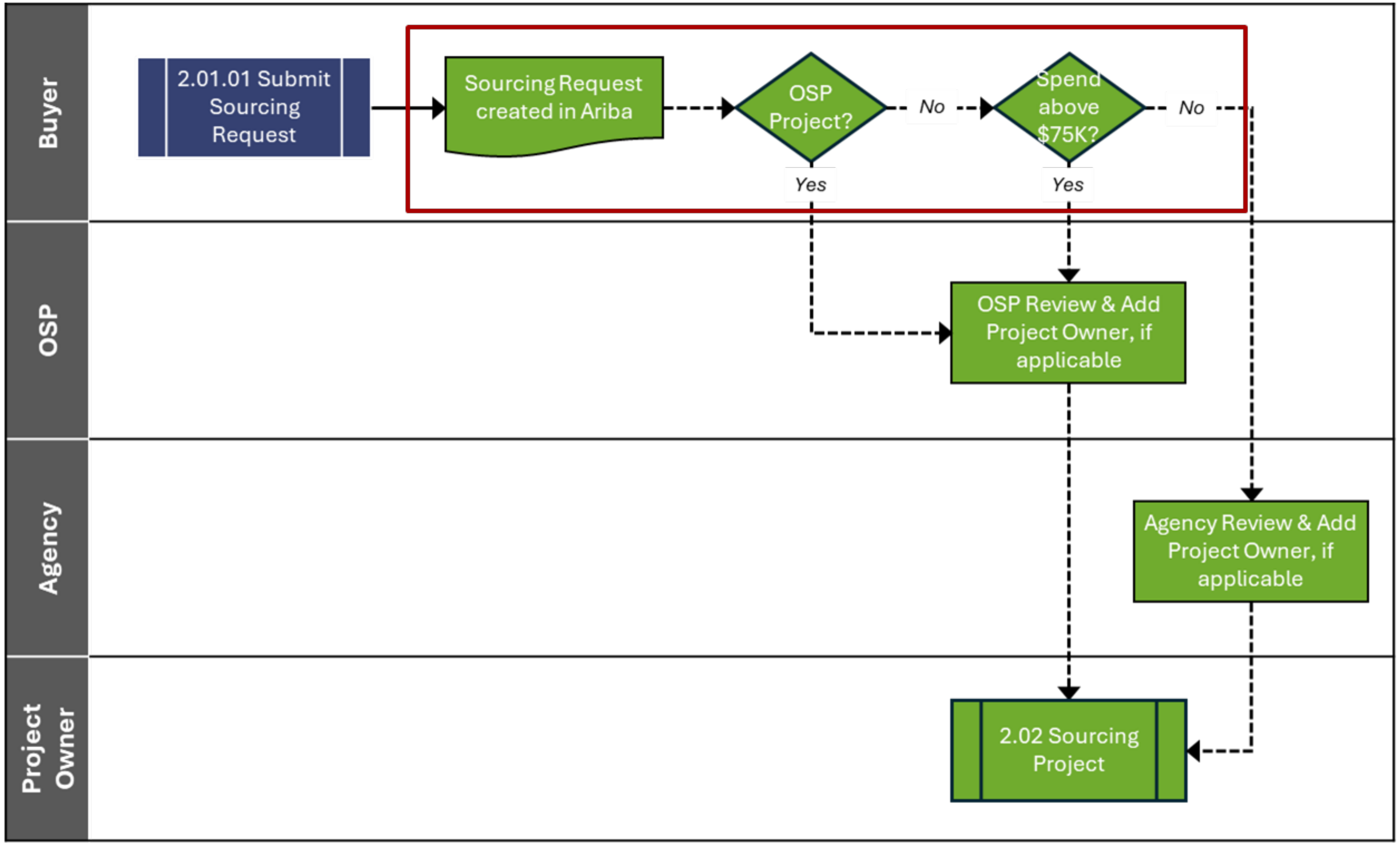
Target Audience: Buyer
Purpose: Evaluate S/4 Purchase Requisition (PR) & Create RFQ

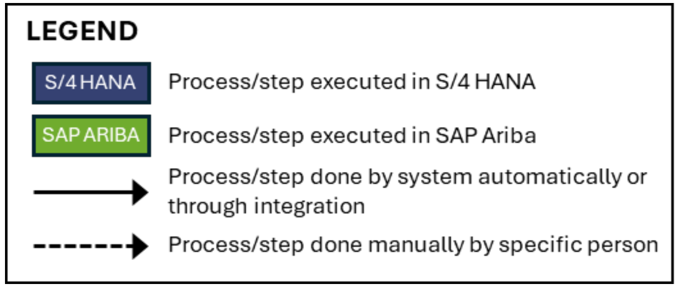




Process Flow, Validate, Update & Route Ariba SR

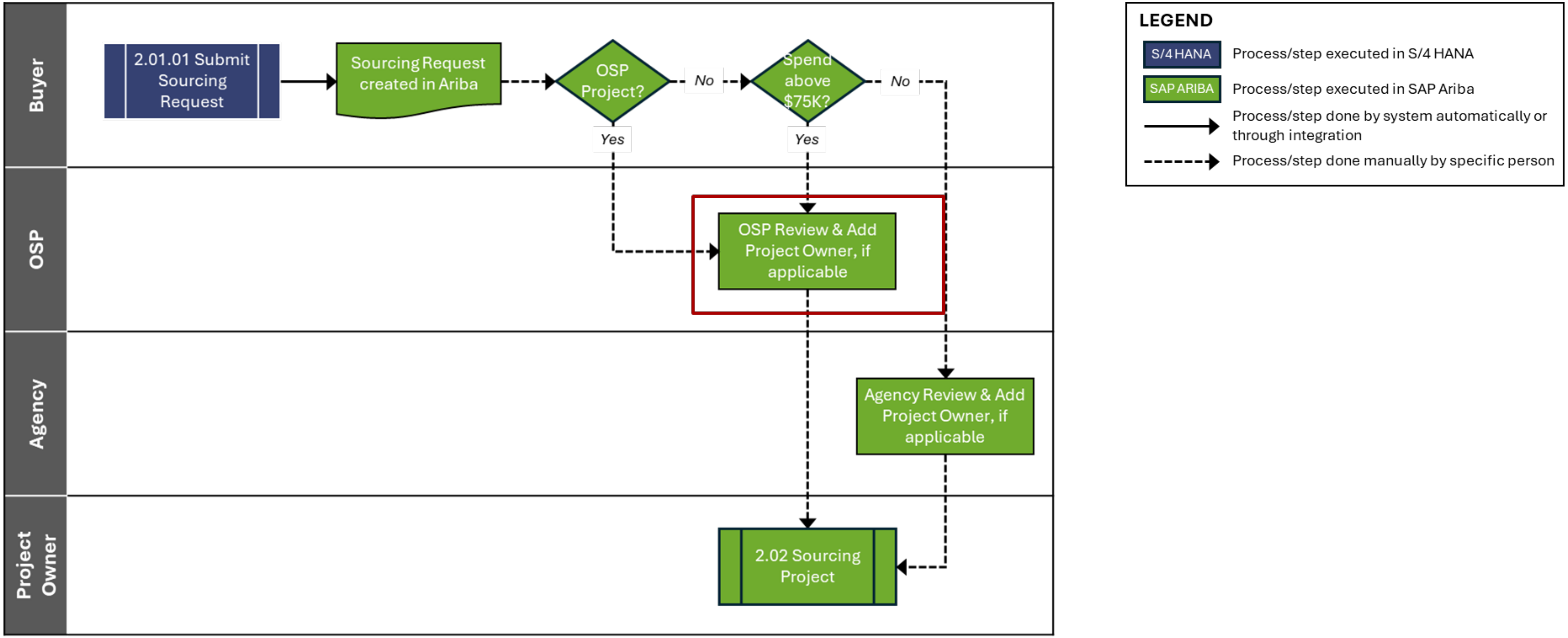
Target Audience: Buyer
Purpose: Validate, Update & Route Ariba Sourcing Request (SR)





Process Flow, Review & Approve SR, OSP

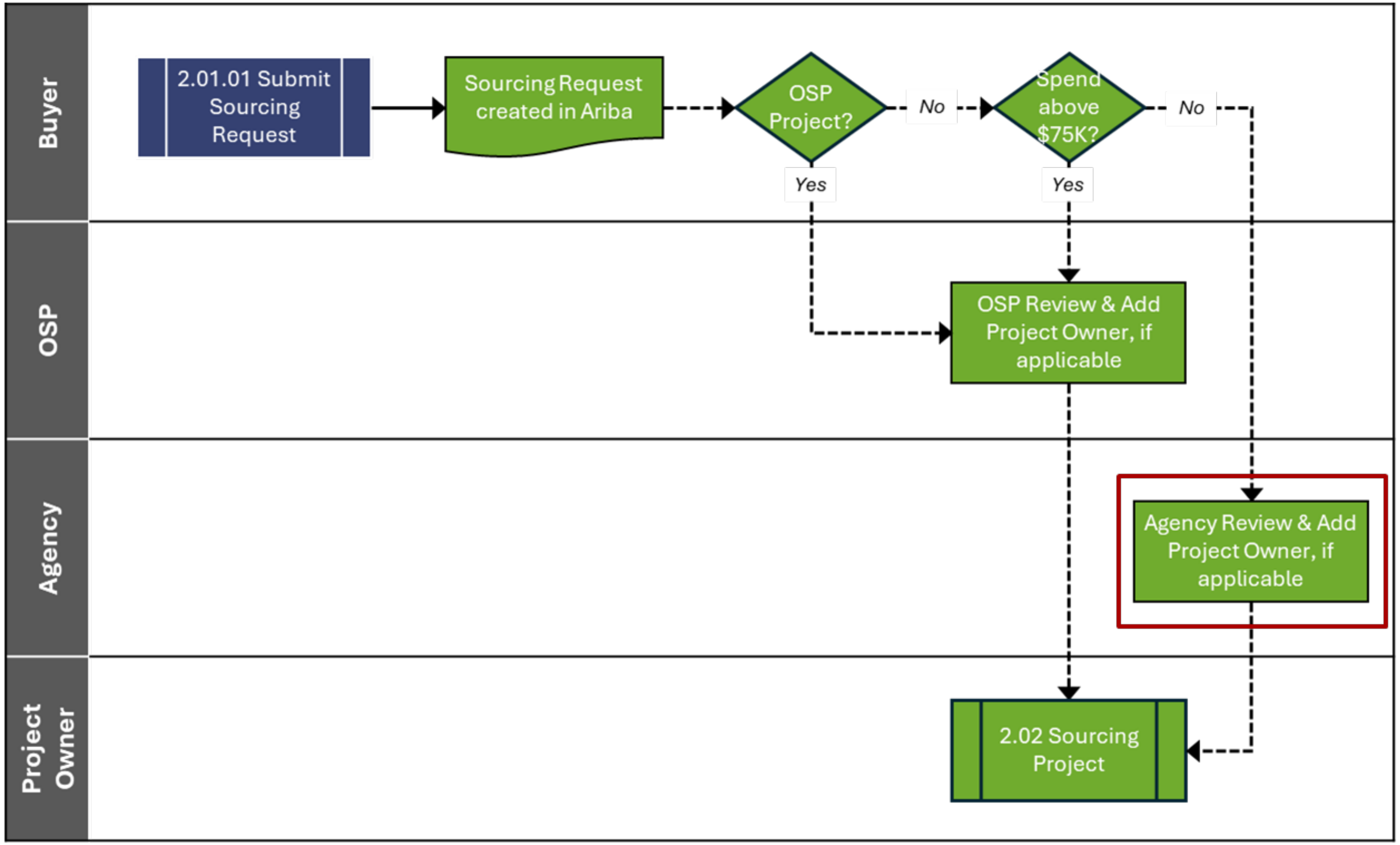
Target Audience: OSP Procurement Lead
Purpose: Review & Approve Ariba Sourcing Request (SR), OSP

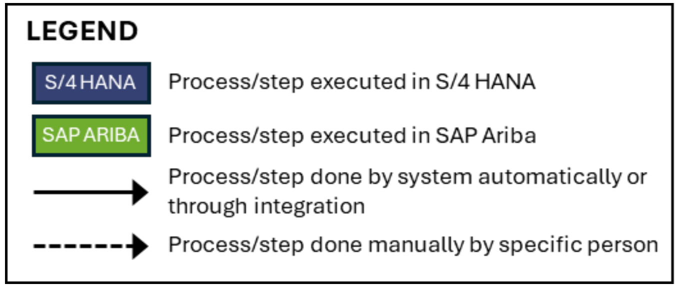


Process Flow, Review & Approve SR, Agency

Target Audience: Agency Procurement Lead

Purpose: Review & Approve Ariba Sourcing Request (SR), Agency





Key Terminology

- **Purchase Requisition (PR):** An internal request to buy a material or service – used to signal demand and start the procurement process. It's typically created by a requester and then reviewed/approved before a buyer converts it into a purchase order (PO) or a sourcing request (that is gets processed into SAP Ariba).
- **Purchase Order (PO):** A formal, external commitment to a supplier to buy materials or services at agreed terms (price, quantities, delivery dates, and conditions). It's the core document that drives downstream execution—receiving, invoice verification, and payment.
- **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).
- **Spend:** Refers to the organization's purchasing expenditures on goods and services that sourcing teams analyze and influence through sourcing events (e.g., RFx) and supplier negotiations.

Evaluate Purchase Requisition (PR) & Create RFQ in S/4

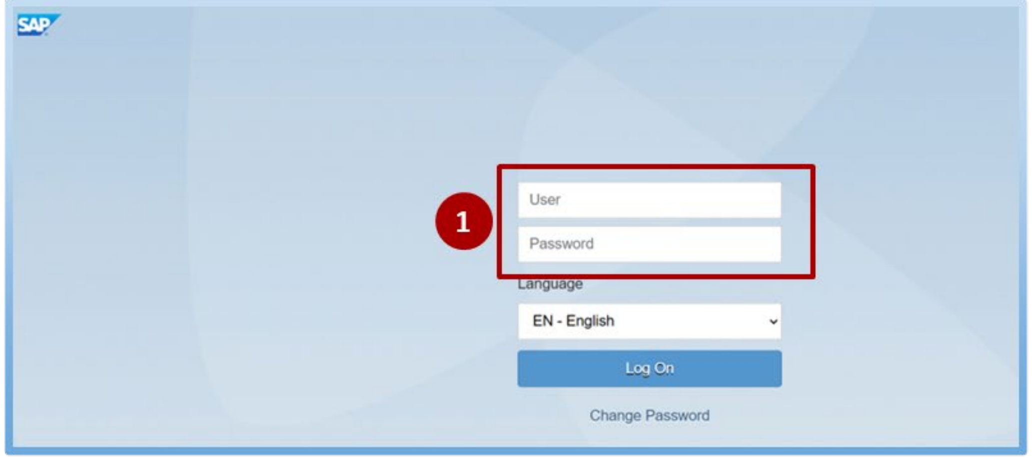
Evaluate Purchase Requisition (PR) & Create RFQ in S/4 (1 of 5)

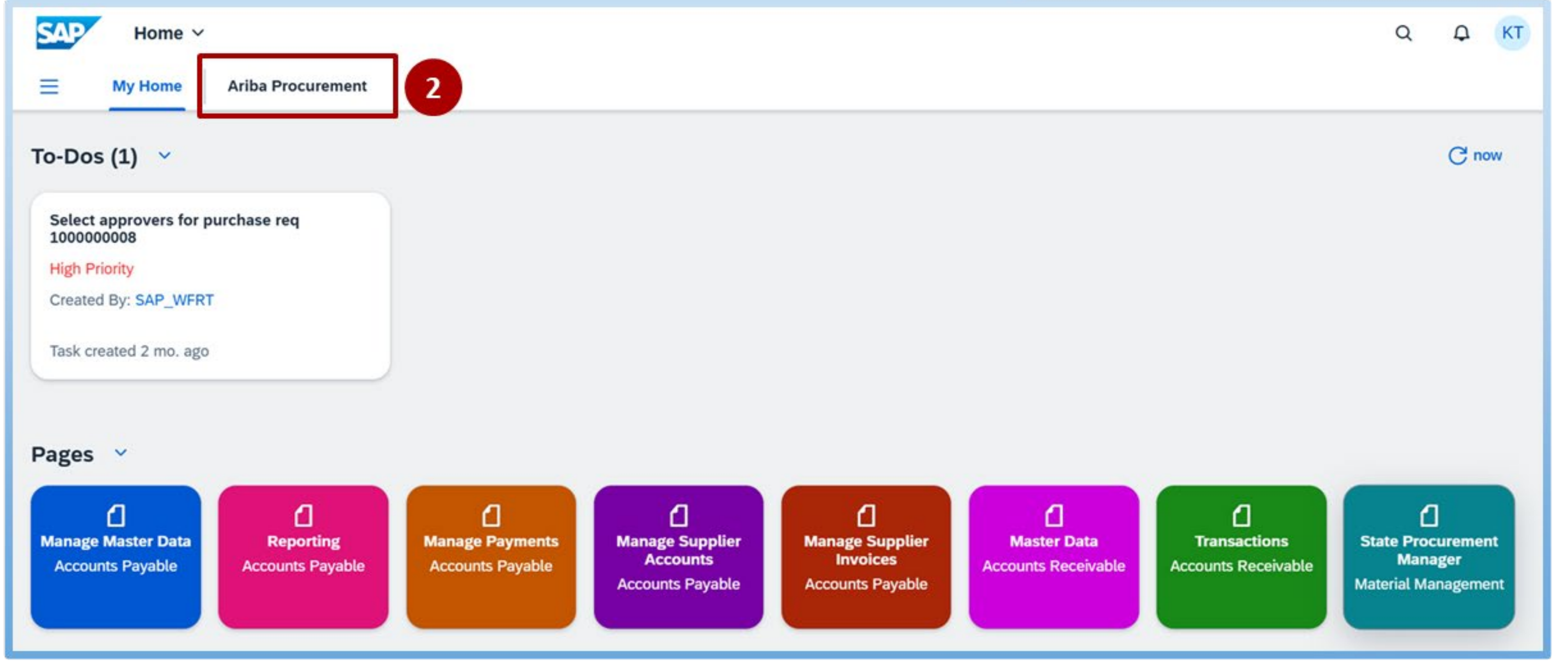
Action: Evaluate S/4 PR to Determine if Sourcing is Required

- If **Yes**, create RFQ doc in S/4 (pushed to Ariba as a Sourcing Request (SR) via Quote Automation) – see instructions below
- If **No**, create PO

Role: Buyer

Step	Action Taken
1	To evaluate a PR in S/4, log into **S/4 Fiori app** with your S/4 enterprise credentials/access.
2	On your **Home Page**, click **Ariba Procurement** at the top right of the page. **NOTE**: *If Ariba Procurement is not displayed, click the* ***three line menu*** *in the top left of the page, scroll down to* ***Ariba Procurement****, and click the* ***thumbtack icon*** *to pin the space to the top menu.*





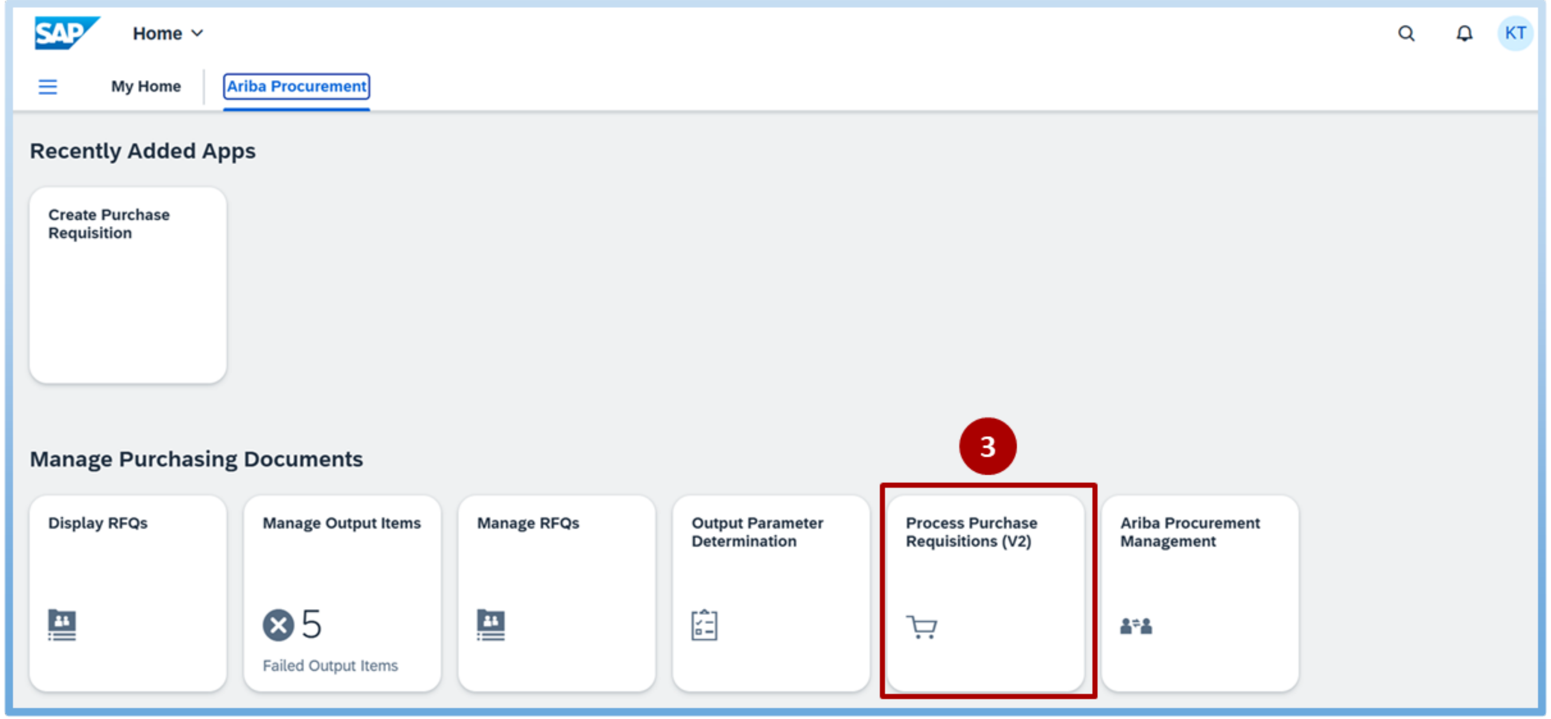
Evaluate Purchase Requisition (PR) & Create RFQ in S/4 (2 of 5)

Action: Evaluate S/4 PR to Determine if Sourcing is Required

- If **Yes**, create RFQ doc in S/4 (pushed to Ariba as a Sourcing Request (SR) via Quote Automation) – see instructions below
- If **No**, create PO

Role: Buyer

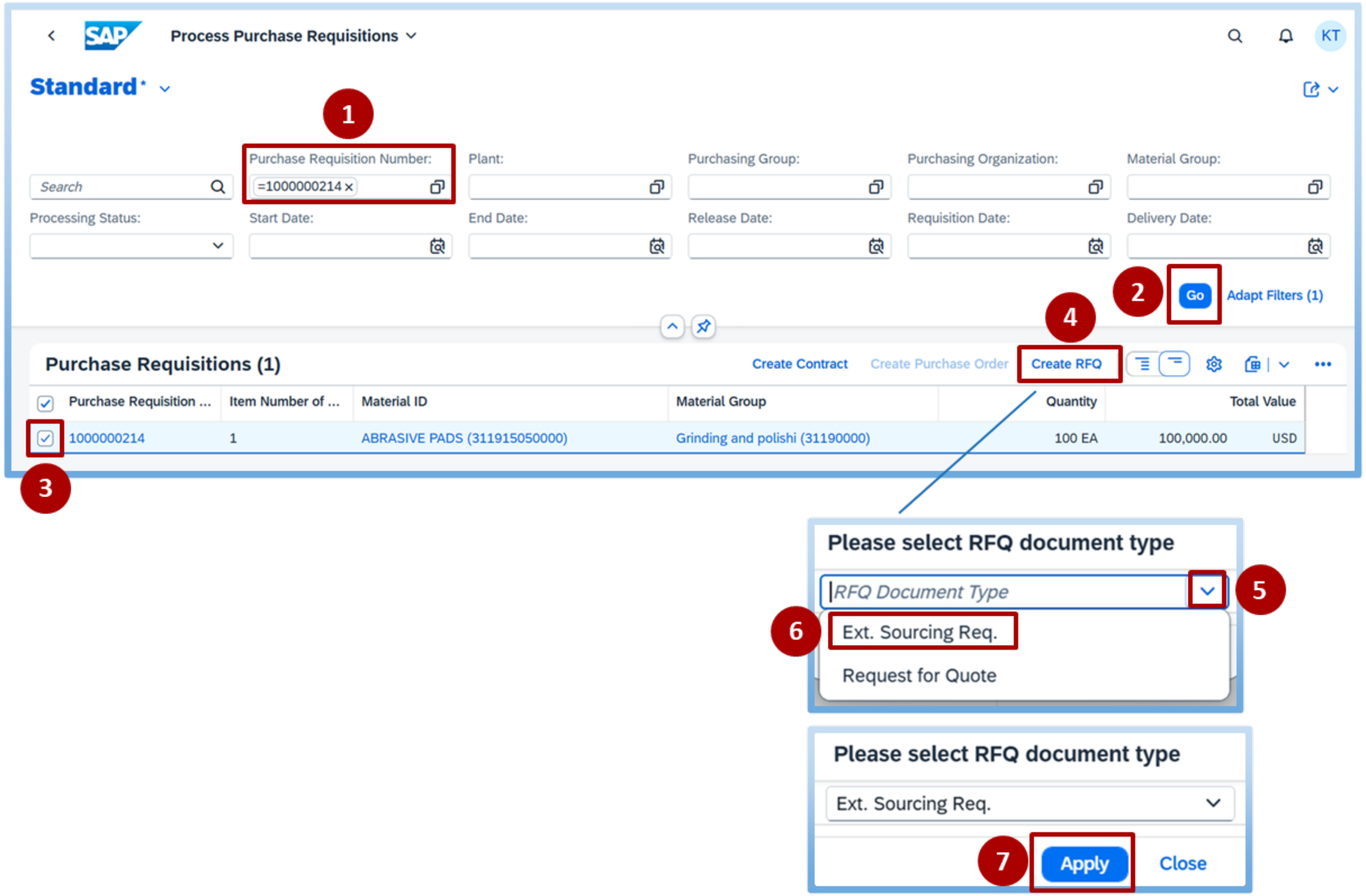
Step	Action Taken
3	Click the **Process Purchase Requisition (V2)** tile. **NOTE**: If the **Process Purchase Requisition** tile is not displayed, *enter **ME51N** in the search and press **Enter**.*



Evaluate Purchase Requisition (PR) & Create RFQ in S/4 (3 of 5)

Action: Create RFQ
Role: Buyer

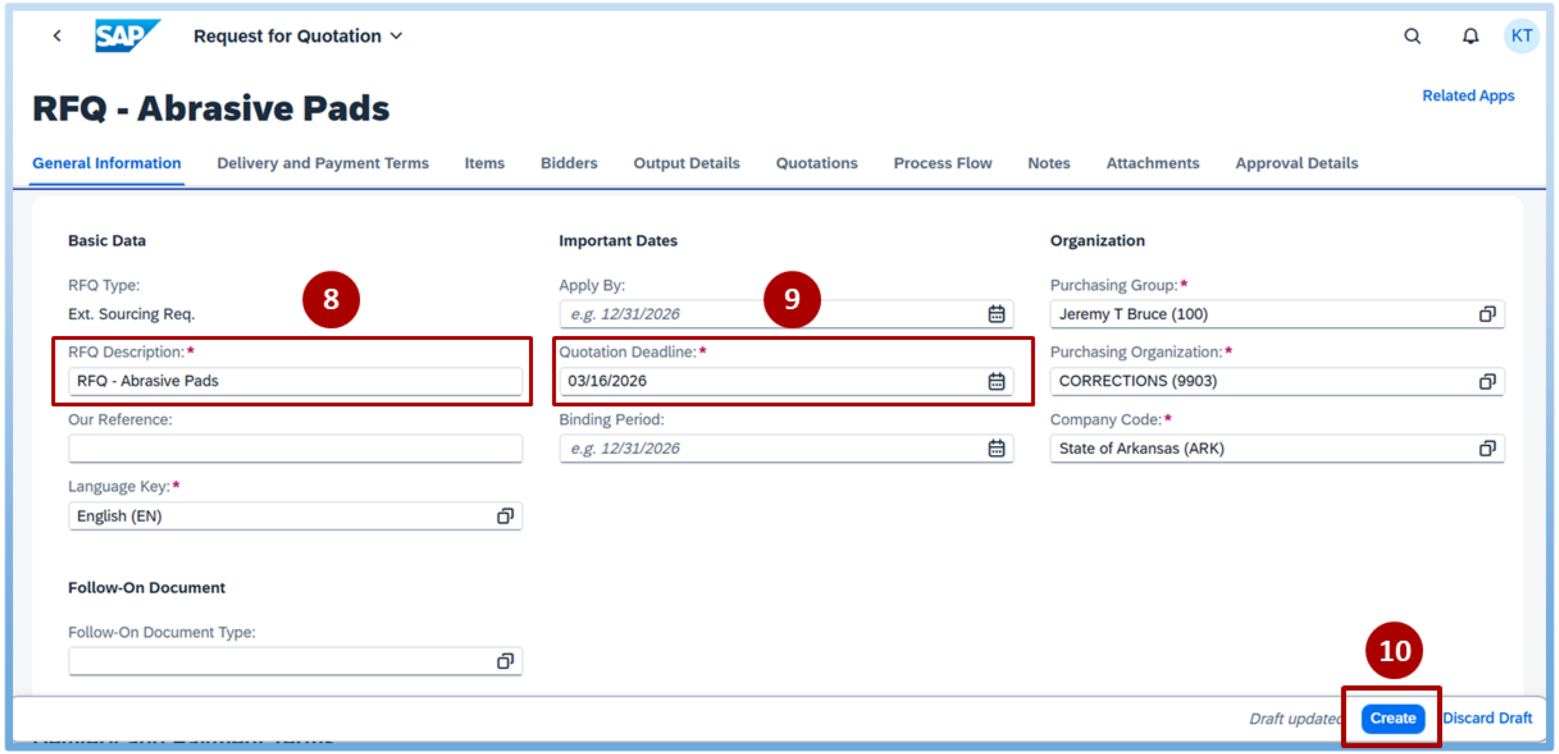
Step	Action Taken
1	Enter the *PR number* in the **Purchase Requisition Number** field.
2	Click **Go**. **NOTE**: *The corresponding PR displays.*
3	Click the **checkbox** next to the PR.
4	Click **Create RFQ**.
5	Click the **RFQ Document Type drop-down list** on the pop-up window.
6	Select **Ext. Sourcing Req.** from the drop-down list.
7	Click **Apply**.



Evaluate Purchase Requisition (PR) & Create RFQ in S/4 (4 of 5)

Action: Create RFQ
Role: Buyer

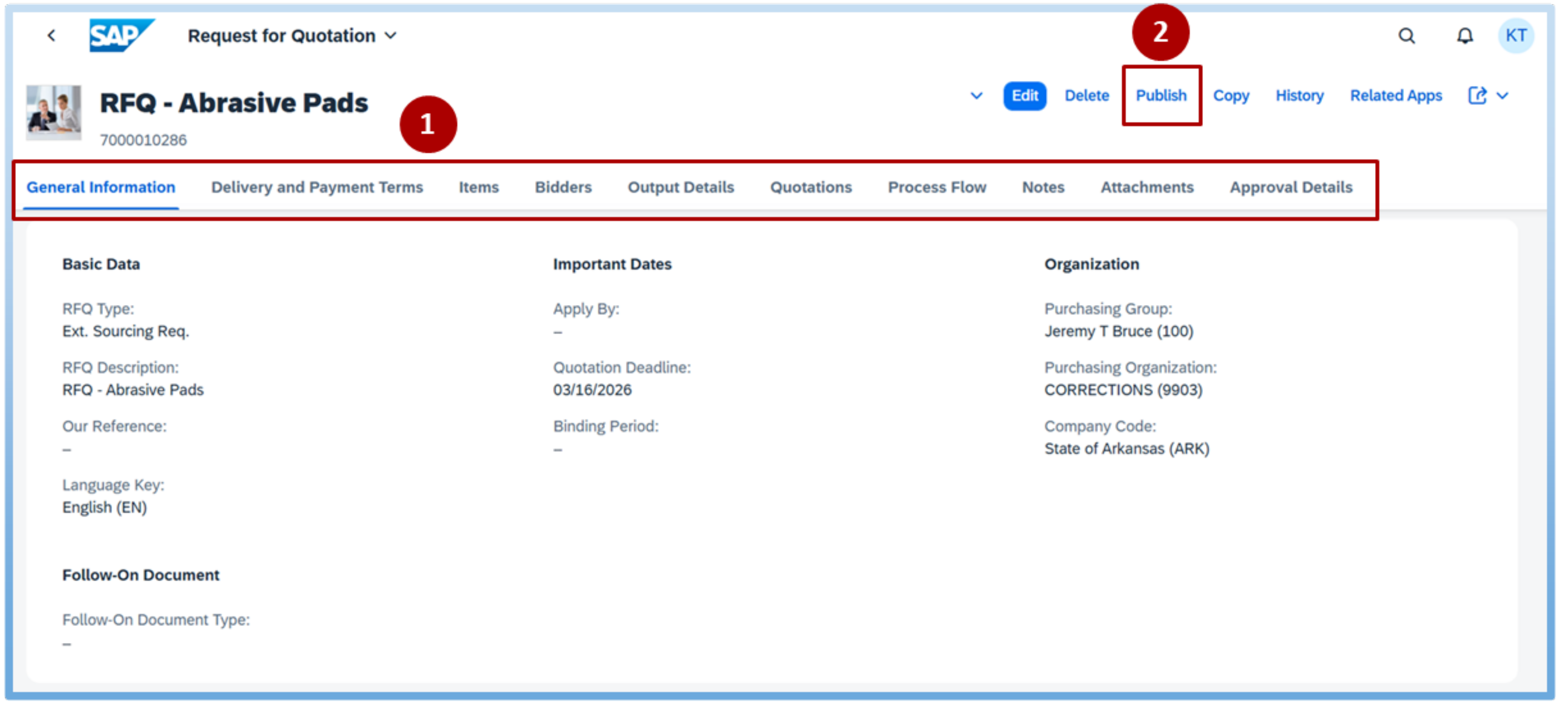
Step	Action Taken
8	Enter the *RFQ name* in the **RFQ Description** field.
9	Populate the **Quotation Deadline** field. **NOTE**: *The date must not be later than the delivery date set in the requisition. Notice the other details pre-populated based on the requisition details.*
10	Click **Create**.



Evaluate Purchase Requisition (PR) & Create RFQ in S/4 (5 of 5)

Action: Publish RFQ
Role: Buyer

Step	Action Taken
1	Click through the following **tabs in the top menu** to confirm information is accurate/correct. **NOTE**: *Click **Edit** to update information, as needed.*
2	Once the review is complete, click **Publish**. **NOTE**: *The RFQ ID is automatically and pushed to Ariba as a **Sourcing Request (SR)** via Quote Automation.*

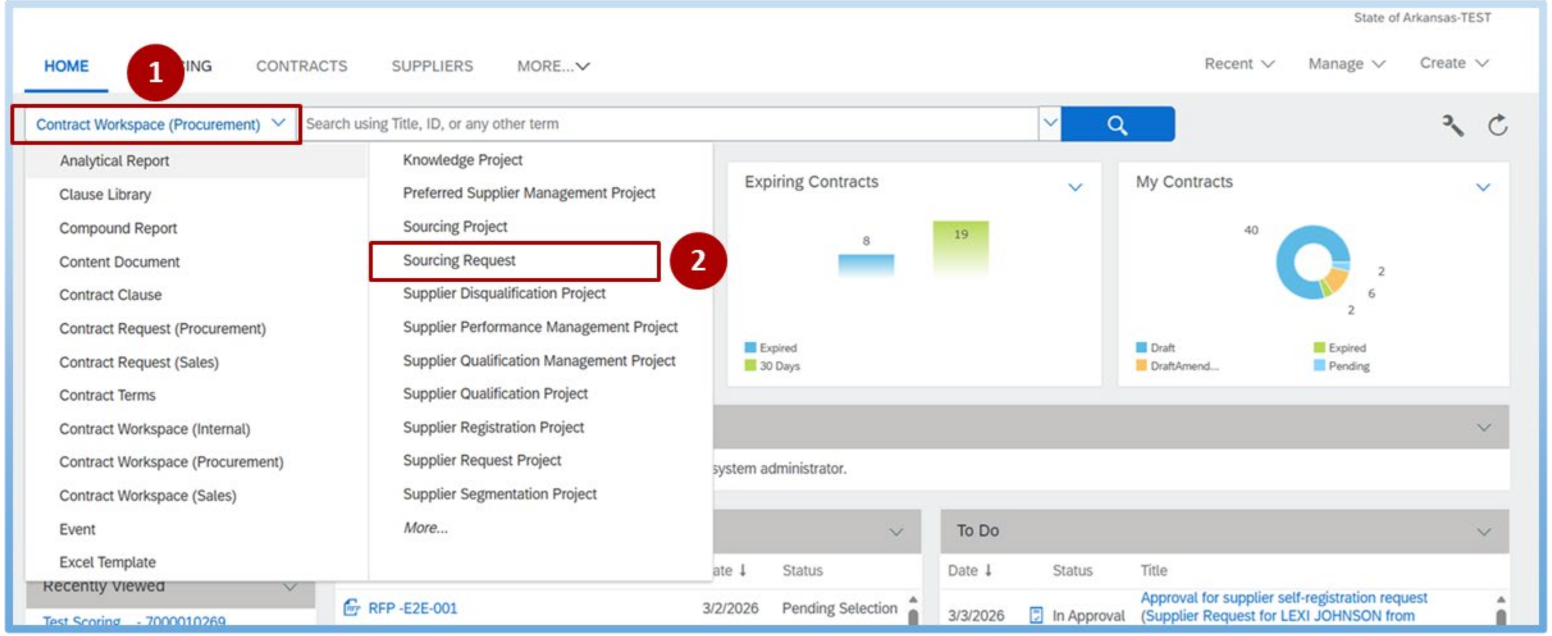


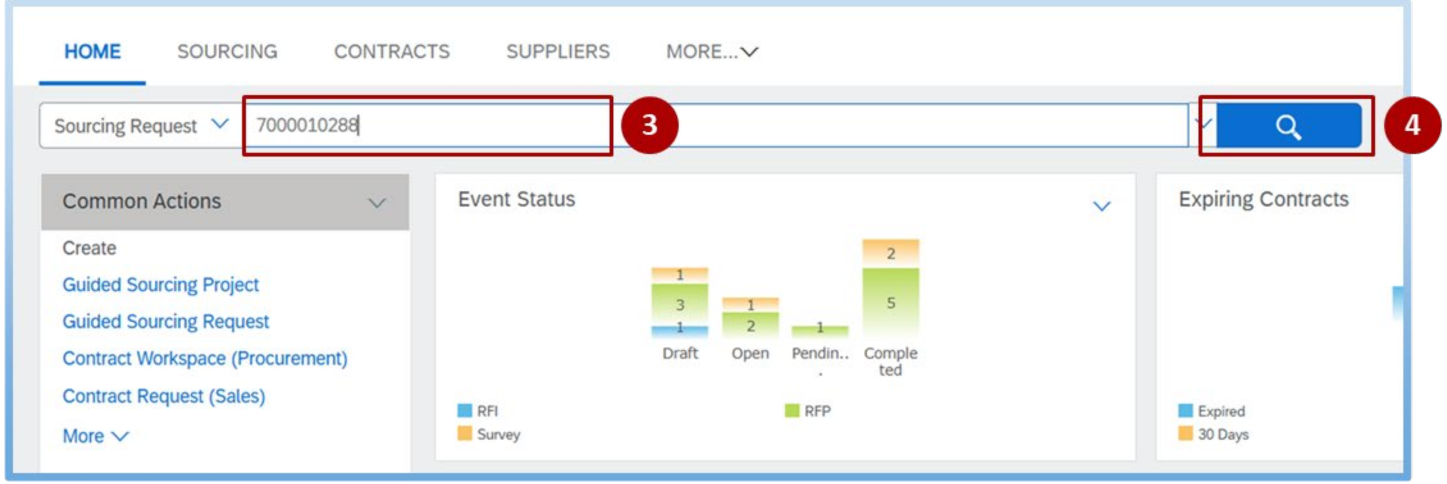
Validate, Update & Route Ariba Sourcing Request (SR) for Approval

Validate, Update & Route Ariba SR for Approval (1 of 6)

Action: Validate and Update Ariba SR
Role: Buyer

Step	Action Taken
1	On the **Ariba homepage**, locate the **Search** section at the top left.
2	Set the **Transaction Type** to *Sourcing Request*.
3	Enter the **RFQ ID** generated from S/4HANA in the search field.
4	Click the **Search** icon.

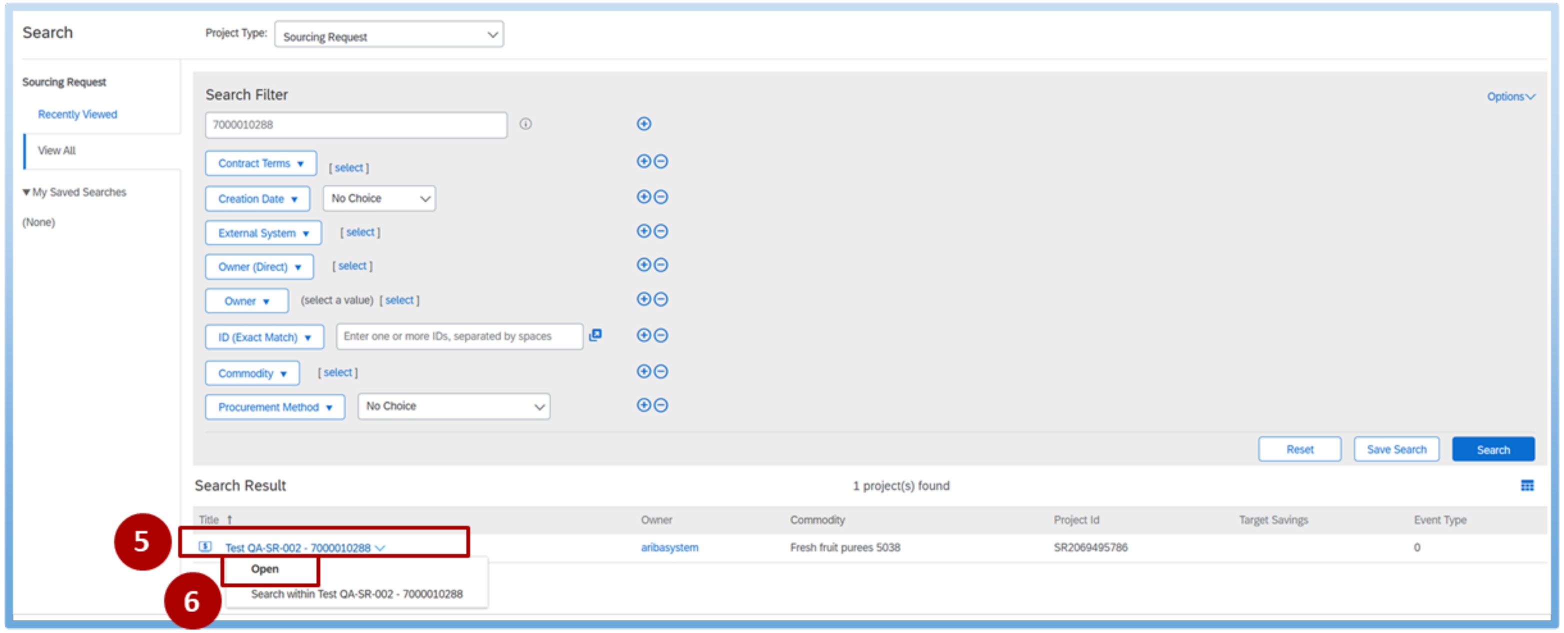


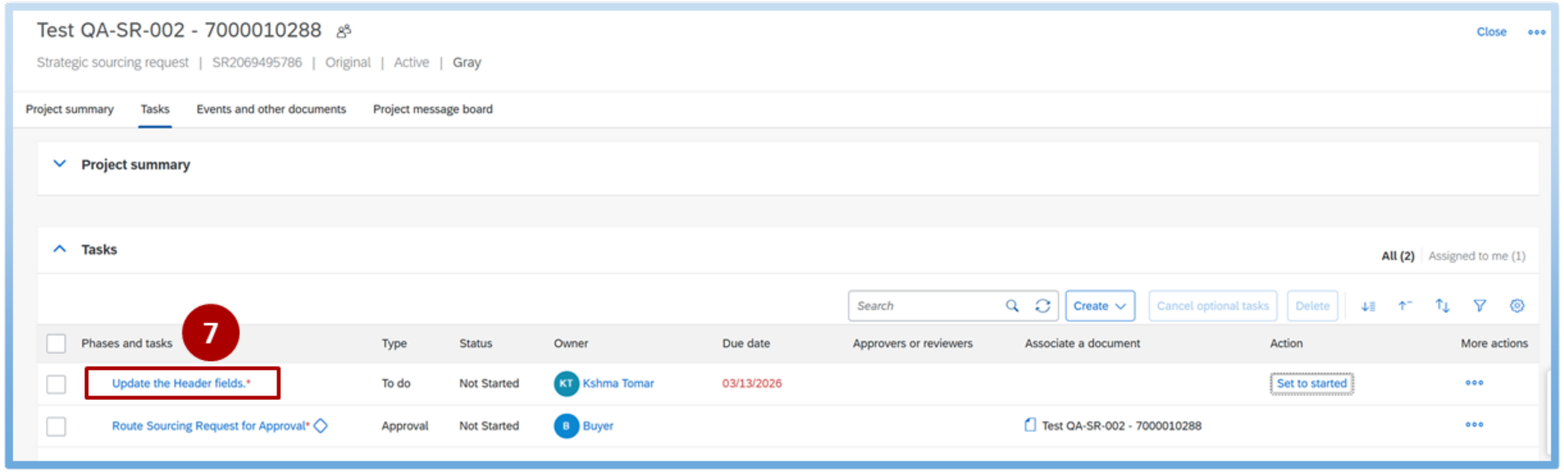


Validate, Update & Route Ariba SR for Approval (2 of 6)

Action: Validate and Update Ariba SR
Role: Buyer

Step	Action Taken
5	Click the **Sourcing Request** from the search results.
6	Click **Open**.
7	Go to the **Task** section and click **Update the Header Fields**.

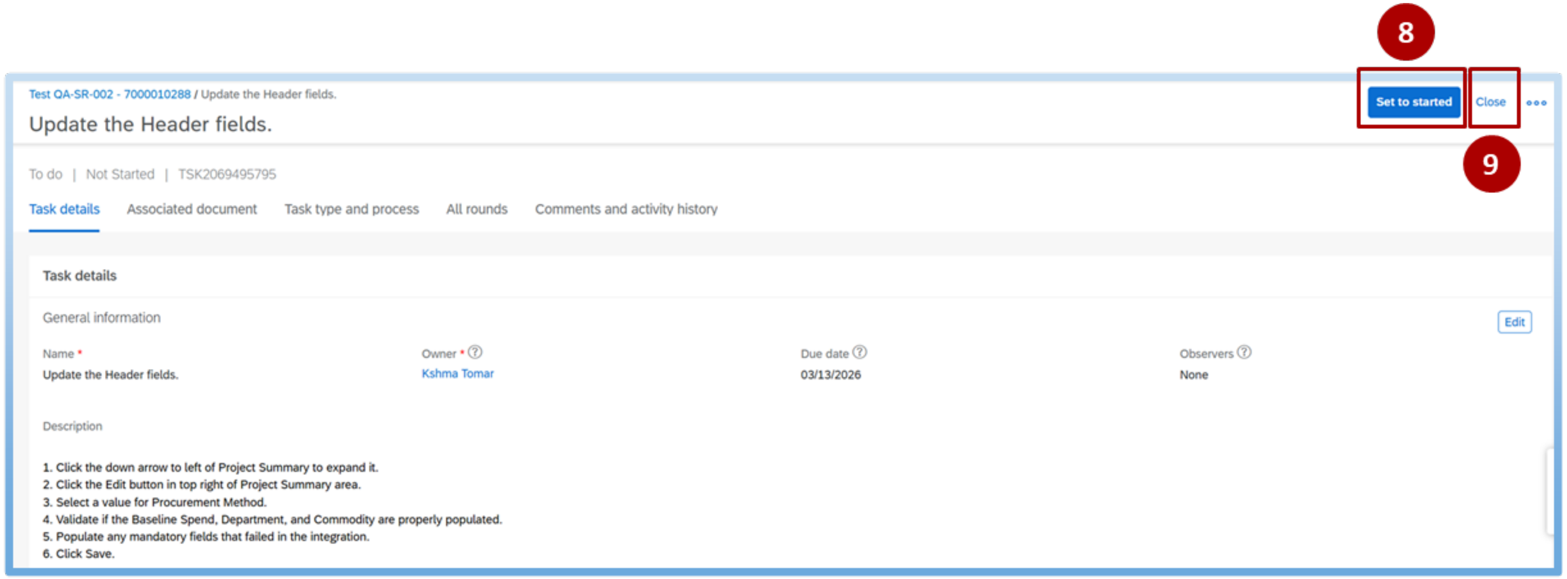


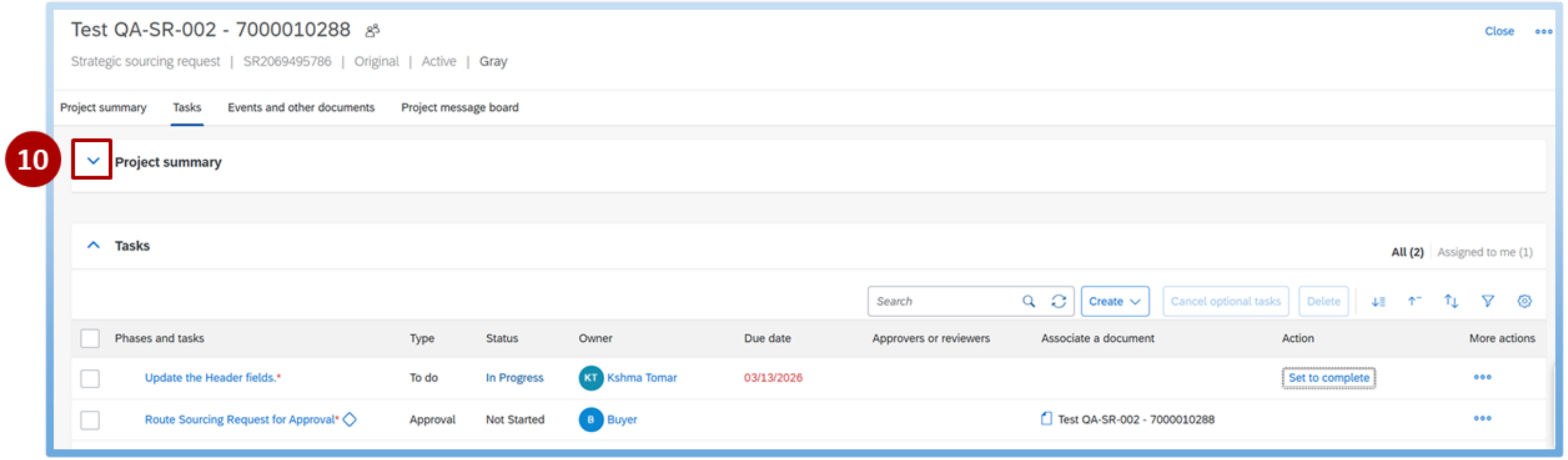


Validate, Update & Route Ariba SR for Approval (3 of 6)

Action: Validate and Update Ariba SR
Role: Buyer

Step	Action Taken
8	Read the task details and then click **Set to Started**.
9	Click **Close** to go back to the main sourcing request screen. **NOTE**: *The **Update the Header Fields** task now shows as In Progress.*
10	Go to the **Project Summary** section and click the **arrow** to expand the section to review project details.

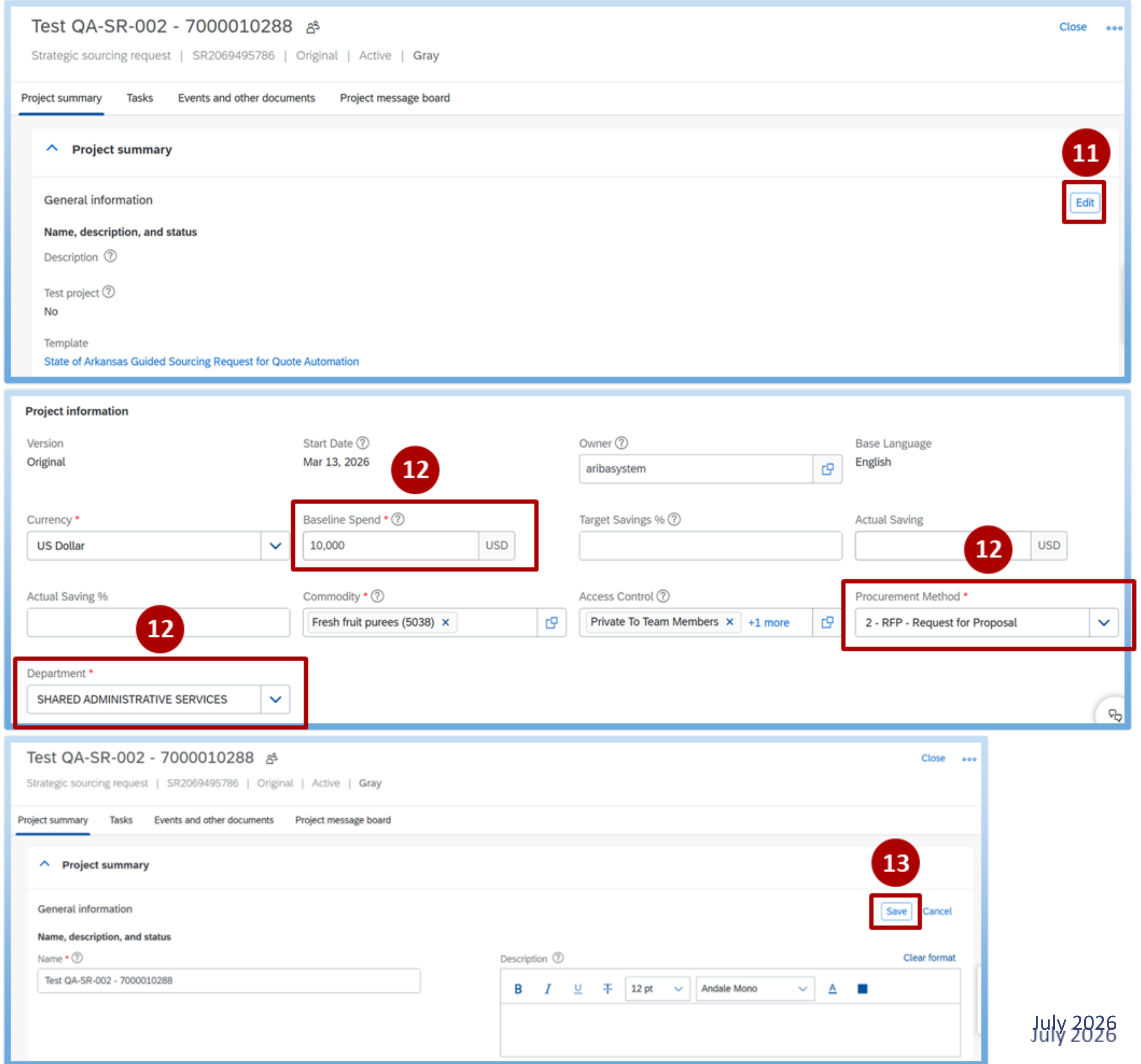




Validate, Update & Route Ariba SR for Approval (4 of 6)

Action: Validate and Update Ariba SR
Role: Buyer

Step	Action Taken
11	Click **Edit**.
12	Scroll down to the **Project Information** section and populate the following fields: • **Baseline Spend** • **Procurement Method** • **Department** **NOTE**: *The **Baseline Spend** and **Department** values will come from S/4 as line-item terms in each line item. Users should copy these values from the line items into the fields, as shown.*
13	Click **Save** once done.



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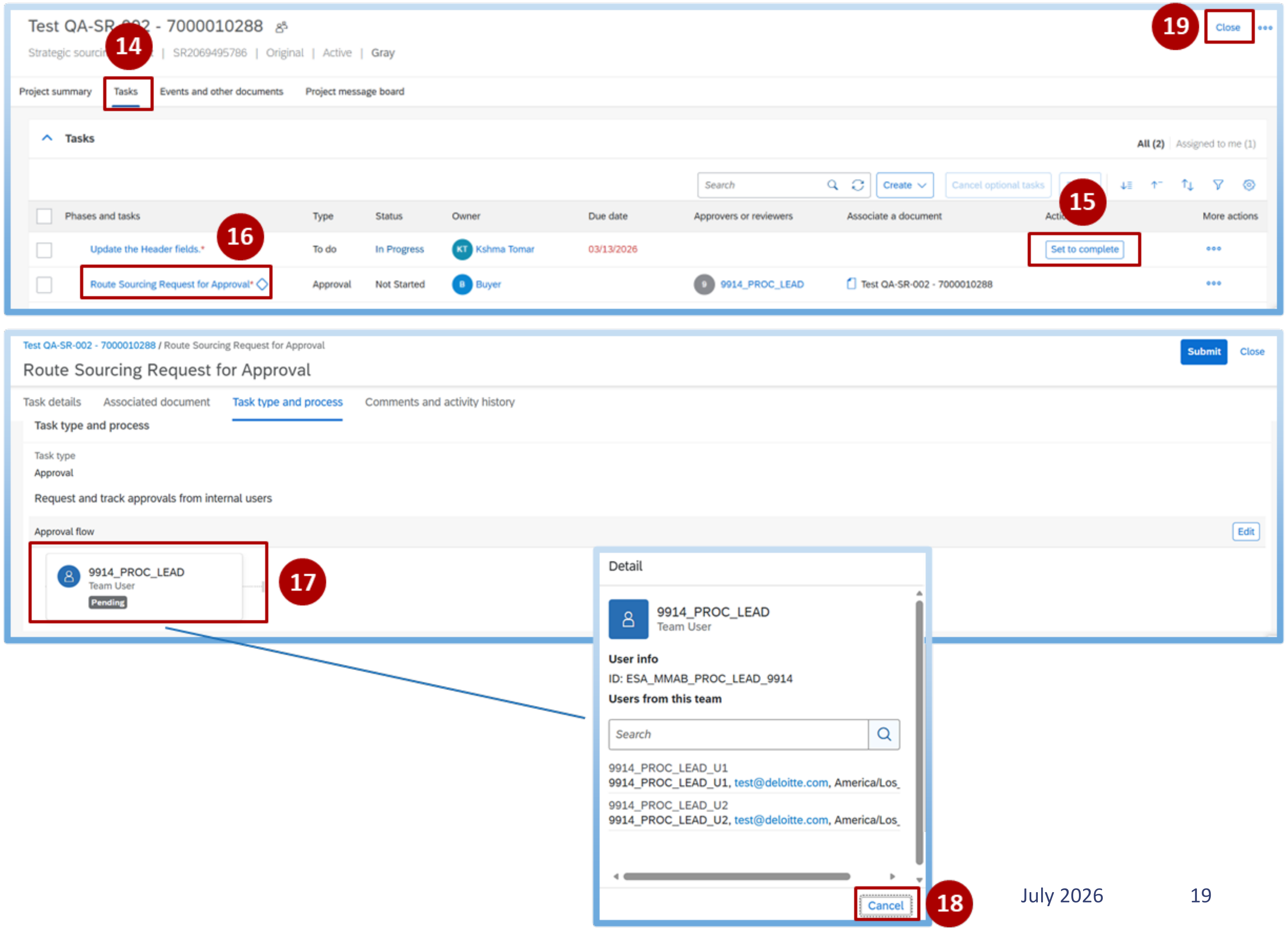
Validate, Update & Route Ariba SR for Approval (5 of 6)

Action: Validate and Update Ariba SR
Role: Buyer

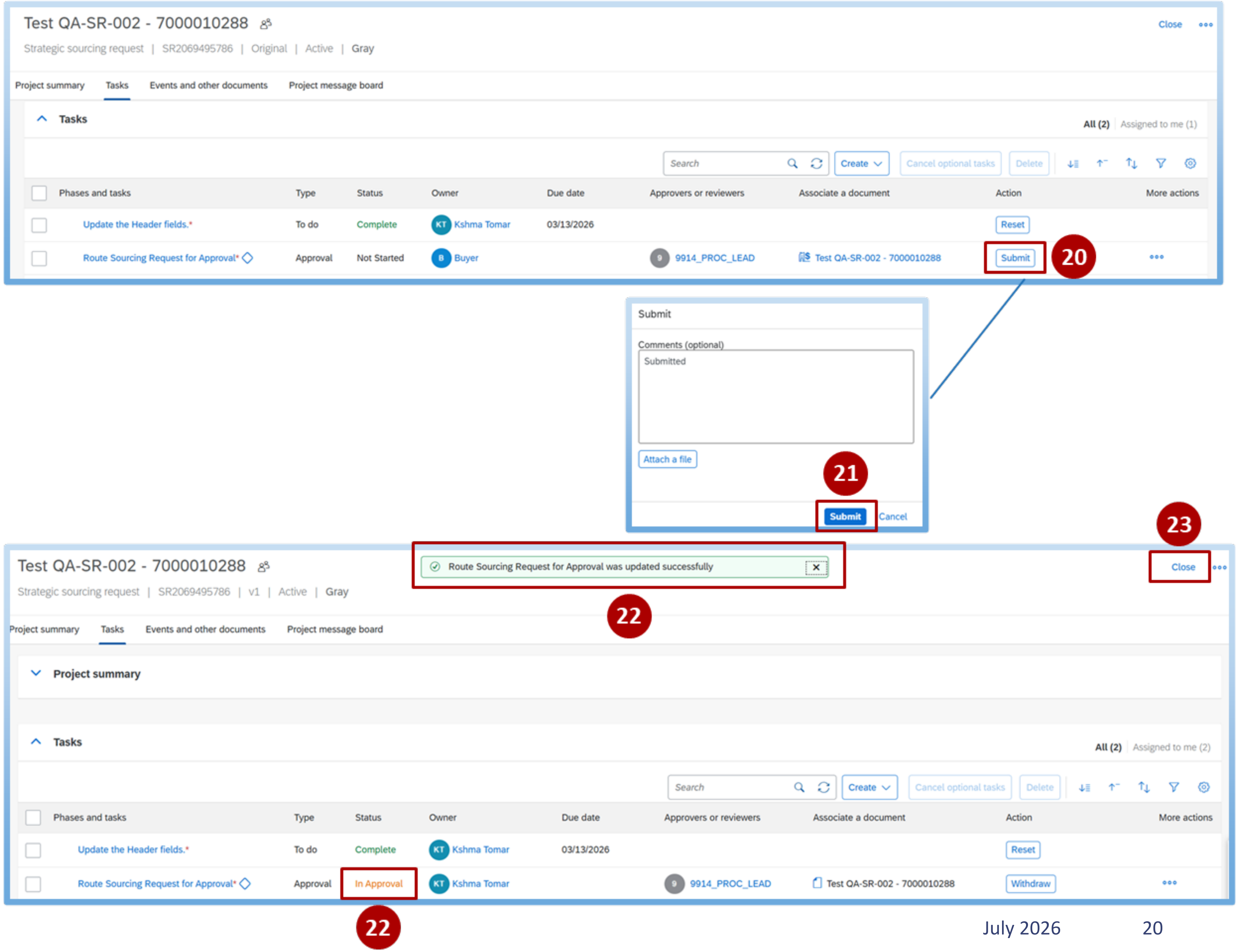
Step	Action Taken
14	Go to the **Task** section.
15	In the **Update the Header Fields** task, click **Set to Complete** under the **Action** column. **NOTE**: *The **Status** for the task will change to **Complete** from **In Progress**.*
16	In the same **Task** section, click the **Route the Sourcing Request for Approval** task.
17	Scroll down to review the **Approval Flow** section in the **Task Type and Process** section and click the **node** in the **Approval** flow. **NOTE**: *This will display the User IDs that are added to this node for the required approver(s).*
18	After viewing the user list, click **Cancel** to close the Detail screen.
19	Click **Close** at the top right of the screen.



Validate, Update & Route Ariba SR for Approval (6 of 6)

Action: Route Ariba SR for Approval
Role: Buyer

Step	Action Taken
20	Click **Submit** to the right of the **Route the Sourcing Request for Approval** task. **NOTE:** *A pop-up box will appear, allowing for comments and/or attachments. Adding comments and attaching a file are optional.*
21	Click **Submit** to proceed.
22	Note the status for the task has changed from **Not Started** to **In Approval** in the **Status** column.
23	Click **Close** in the top right of the page to go back to the main **Sourcing Request** screen.



Review & Approve Ariba Sourcing Request (SR), OSP or Agency

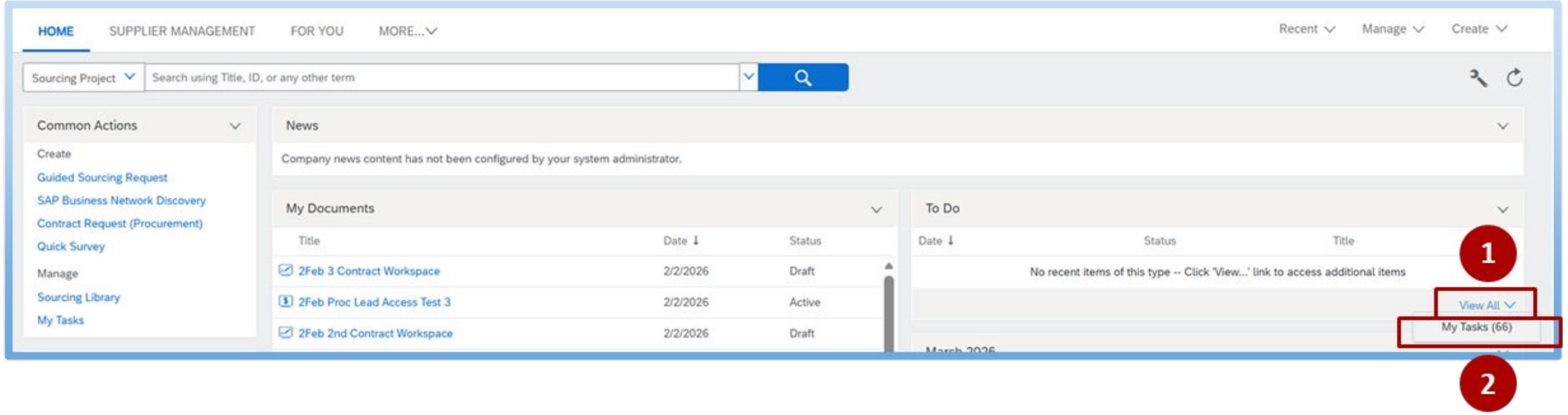
Review & Approve Ariba Sourcing Request (SR), OSP or Agency (1 of 2)

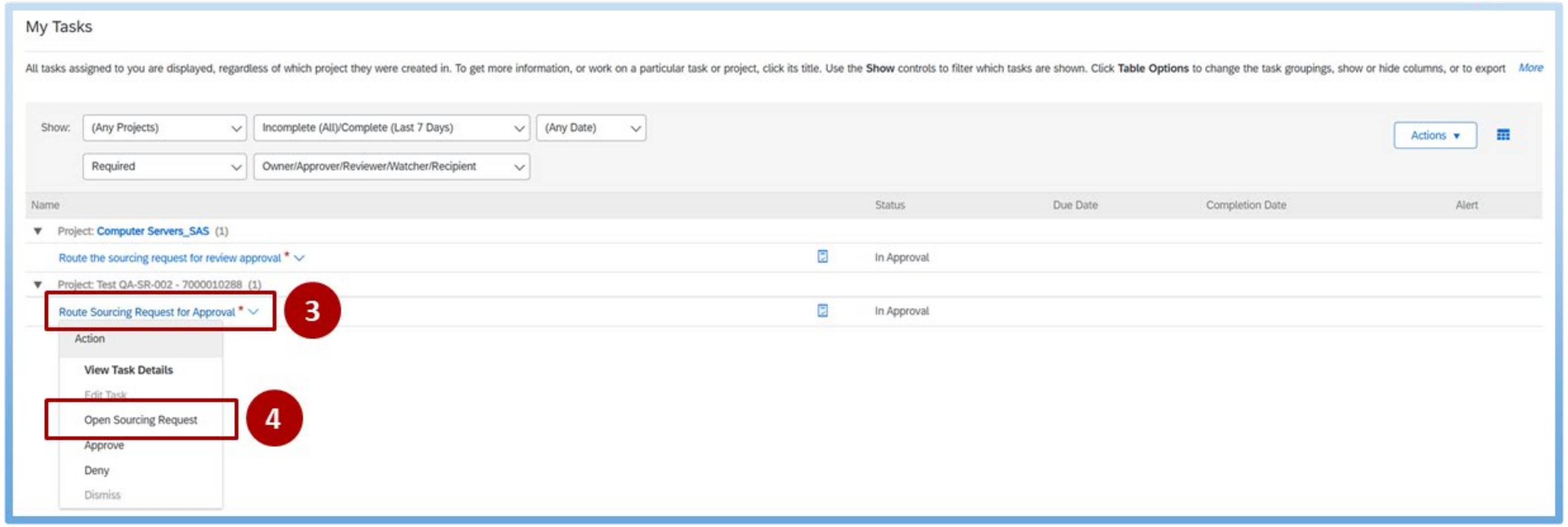
Action: Review Ariba SR
Role: OSP Procurement Lead, Agency Procurement Lead

Step	Action Taken
1	On the **Ariba Homepage**, navigate to the **To-Do** section and click **View All**.
2	Select **My Tasks**.
3	Review the list for the **appropriate transaction** name and **click it** once found.
4	Click **Open Sourcing Request** to review details.

NOTE:

- *If SR is an **OSP Project** or **$75K or above**, review and approval by **OSP Procurement Lead** required*
- *If SR is **NOT** an **OSP Project** or **$75K or above**, review and approval by **Agency Procurement Lead** required*





Review & Approve Ariba Sourcing Request (SR), OSP or Agency (2 of 2)

Action: Approve Ariba SR
Role: OSP Procurement Lead, Agency Procurement Lead

Step	Action Taken
5	Review details by clicking **Project Summary** and **Events and Other Documents**.
6	In the **Tasks** section, click **Approve** in the **Action** column **Route the Sourcing Request for Approval** task. **NOTE**: *At this step, approvers can also* ***Reject*** *the Ariba SR.*
7	Add **comments** or **attach files** if needed. **NOTE**: *If the Ariba SR has been rejected, 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.*
9	Click **Close**.

NOTE:
- *If SR is an* ***OSP Project*** *or* ***$75K or above****, review and approval by* ***OSP Procurement Lead*** *required*
- *If SR is* ***NOT*** *an* ***OSP Project*** *or* ***$75K or above****, review and approval by* ***Agency Procurement Lead*** *required*