SAP Ariba /\\/\\

Feature at a Glance
Guided Sourcing – New user experience for sourcing events

Michael Waugh, SAP Ariba
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THE BEST RUN **SAP**

Feature at a Glance
Introducing: Guided Sourcing – New user experience for sourcing events

Customer challenge

The existing solution has an outdated UI and is very cumbersome to use.

Meet that challenge with
SAP Ariba

We are solving the usability issues of the legacy application with a new user experience, which will improve customer satisfaction and adoption of the solution by making workflows simpler and more intuitive.

Experience key benefits

Guided sourcing provides a streamlined and intuitive user experience for creating and running SAP Ariba Sourcing events

- Single Page event creation
- Smart excel for line item creation.
- Bulk edit capabilities of event content
- Multi round bidding
- Messaging
- SAP Enable Now for in app guidance

Solution area

SAP Ariba Sourcing
SAP Ariba Strategic Sourcing Suite

Implementation information

This feature is ready for immediate use for all customers with the applicable solutions but requires **customer enablement** steps.

Prerequisites and Restrictions

See Documentation for Prerequisites and Restrictions

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Migration planning

- **No cost adoption -** There is no charge for the New UX. It will be available to all SAP Ariba Sourcing Customers.

- **Adopt when ready -** Customers can control when they adopt the new UX. We will not force them to adopt.

- **Permission based access -** Access to the New UX will be controlled by permission. User can create events in both the current UX and the Guided Sourcing UX. (Auctions in classic UX and Multi Round RFP in guided sourcing)

- **Not a 1:1 replacement at GA.** Parity is planned of 4 phases of development. All new functionality will be in Guided Sourcing.

- **Templates**– Templates can be reused. Create a copy and set the Guided Sourcing Template flag to "Yes". Only Guided Sourcing template options will be editable.

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This release of guided sourcing supports the following SAP Ariba Sourcing features

- RFI and RFP events
- Line items, lots (item lots), and sections
- Questions, prerequisites, requirements, and attachments
- Importing line items and sections using simplified Excel imports
- Participant-specific initial values for terms
- Approval For Publish and Approval For Award tasks
- Event monitoring table with bid ranks
- Pre configured award scenarios:
  - Best Bid
  - Best Bid with Limited Number of Suppliers
  - Best Savings
- Manual award scenarios
- Event message board
- Event notification emails
- Integration with SAP Ariba Analysis (data from guided sourcing events is available in SAP Ariba Analysis reporting)
- Email bidding
- Multi-round events
- Multiple currency events
- Integration with SAP Ariba Contracts (you can create a contract workspace from an award)

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SAP Ariba Sourcing features <u>not</u> supported by guided sourcing in this release include:

- Auctions
- Large-capacity events
- RFQ and award integration with external systems
- Bid transformations
- Matrix pricing
- Service items
- Alternative bids
- Sealed bids
- Envelope bidding
- Pricing conditions
- Full Projects

Sourcing events that require these features will need to be created in the classic user interface.

Please check the documentation for the most up to date list of what is not supported.

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How to enable guided sourcing

SAP Ariba provides a simple, one-step operation for customer administrators to enable guided sourcing.

Procedure
1. On the dashboard, click Manage Administration.
2. On the Ariba Administrator page, click Guided Sourcing Enable Guided Sourcing in the left panel.
3. On the Enable Guided Sourcing Page, click Enable.

This will run tasks to enable guided sourcing and also installs the following guided sourcing templates in the Sourcing Templates folder within the templates area:
- Request for Information - Guided Sourcing Template
- Request for Proposal - Guided Sourcing Template

For users to access the guided sourcing user experience once it has been enabled they need to be added to the **Category Buyer** group.
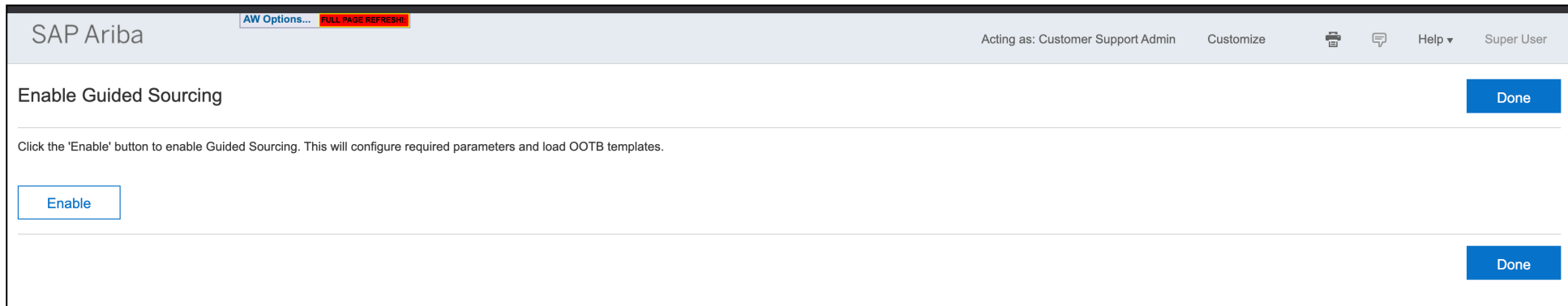
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Templates

There is a new flag in the template properties called Guided Sourcing Template

- If the flag is set to **Yes**, then the template will only be visible for Guided Sourcing events.
    - Only the parameters for functionality that have been developed for guided sourcing are available for editing in a guided sourcing template.
    - All other parameters for features that have not been migrated to guided sourcing user experience will be disabled and will not be editable.

- If the flag is set to **No** then the template is a standard template that can only be used in the classic sourcing user experience.
    - All template parameters are available for editing on a current sourcing UX templates

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For You Dashboard

Introducing the **For You** dashboard, which provides easy access to guided sourcing events. The **For You** dashboard includes the following components:

- Feed cards for recent events that have occurred as well as events that require approval.

- Summary panel. Displays the number of guided sourcing events you can view, separated by event state (**Draft**, **Open**, **Review responses**, **Awarded**). Click the number above an event state to search for guided sourcing events in that state. You can also click **To-Dos** and show links to tasks assigned to you.

- Clickable links to items you've recently viewed.

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For You Content

The **For You** content item can be added to any existing or user-created custom tab. You can access the three most recent feed items and search for all feed items in the **For You** content item.

To add the For You content to an existing dashboard select the For You content from the Add Content menu and drag it to the dashboard and click done

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How to create a guided sourcing event

To create an event using guided sourcing.

- Click on **Create** and select **RFX** or **Copy of RFx**

- Alternately you can click on **Rfx** or **Copy of Rfx** from the **Common Actions** in an existing dashboard.
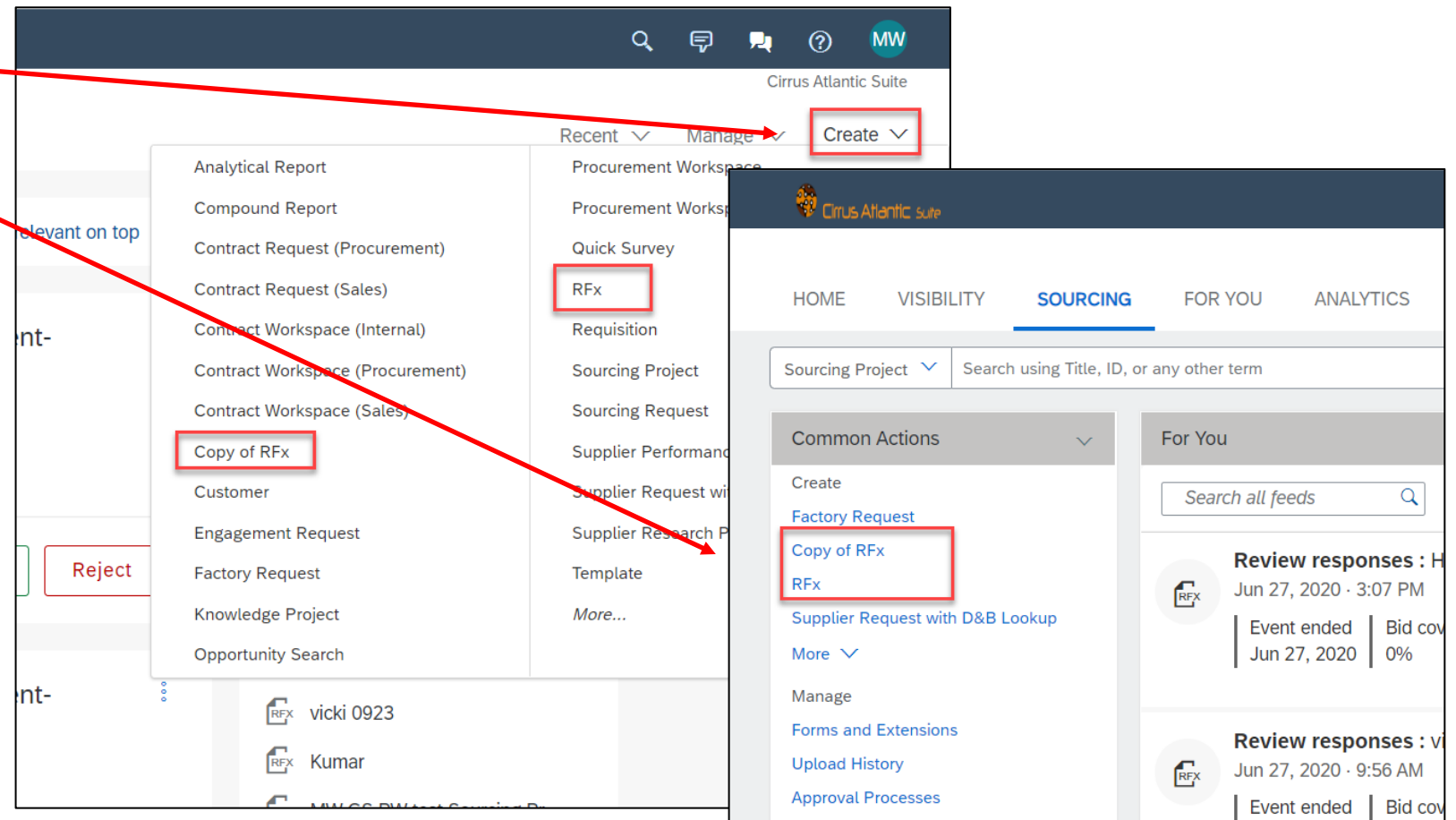
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Adding a guided sourcing event to a classic UX Full Projects

- Guided Sourcing events can be added to classic UX Full Project.

- This allows user to have a mix of guided sourcing and classic UX events to meet their business needs. (auctions, envelopes)

- To add a guided sourcing event to a classic UX Full project, click on **Actions** on the **Documents** tab and select **Guided Sourcing Event**

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Copying an existing RFx

- Select on Copy of Rfx option.

- Filter the search to find the existing event.

- Clicking on the event will open in Read only preview mode.

- Select Copy option from menu to copy the event and select what parts of the event that you want to copy to the new event
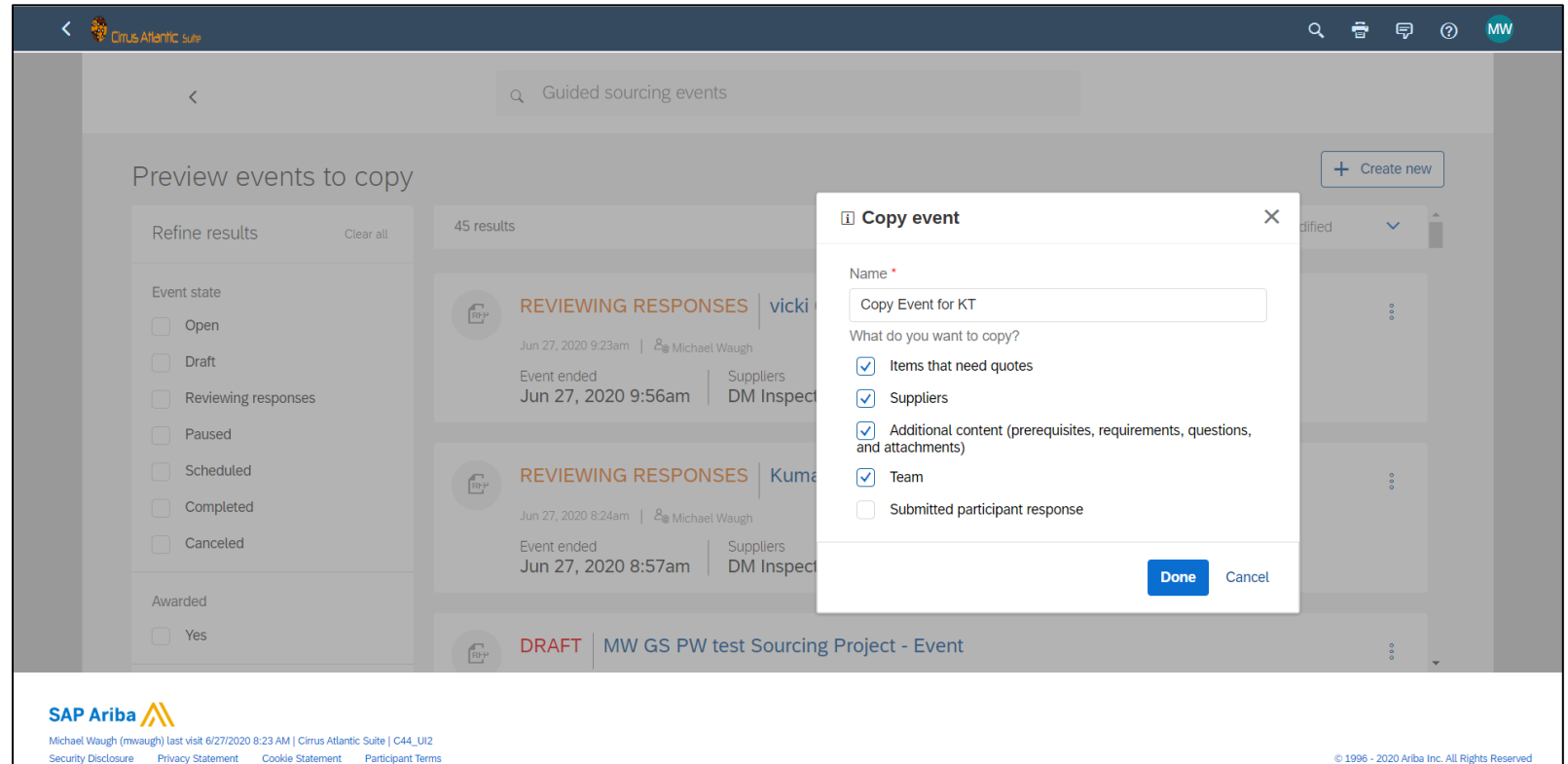
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How to create a new event

- Enter event header level information.

- Select how to create an event
  - A. Create From template
  - B. Smart import from excel
  - C. Copy from existing event

- Type in the name of the template to search for the correct one

- You can collapse the sections that are complete if needed.

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How to create a new event using Smart import from Excel

Drag or browse for the file you want to upload

Example of 2 column unstructured Excel file

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How to create a new event using Smart import from Excel

After the file has been uploaded, review the line items and make any changes required in the field mappings. To modify a mapping, click the header cell that you want to modify and enter a value or select a value from the dropdown list. For example, if you have a column titled "Annual Qty" which contains the quantities of your items, you can ensure it is mapped to our system global term Quantity (which is typically a mandatory field).

SAP Ariba Sourcing uses color-coding to denote the confidence level of each of the mappings. Confidence scores are calculated based on a number of factors such as the similarity in the cell heading, type of data, and previous mappings of similar values.

The color-coding is as follows:

- Green, when the confidence level is 91% and above.
- Yellow, when the confidence level is between 70% and 90%.
- Red, when the confidence level is below 70%.

SAP Ariba Sourcing saves the corrections you make and puts that learning to use while interpreting unstructured Excel files later.

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How to navigate event creation page
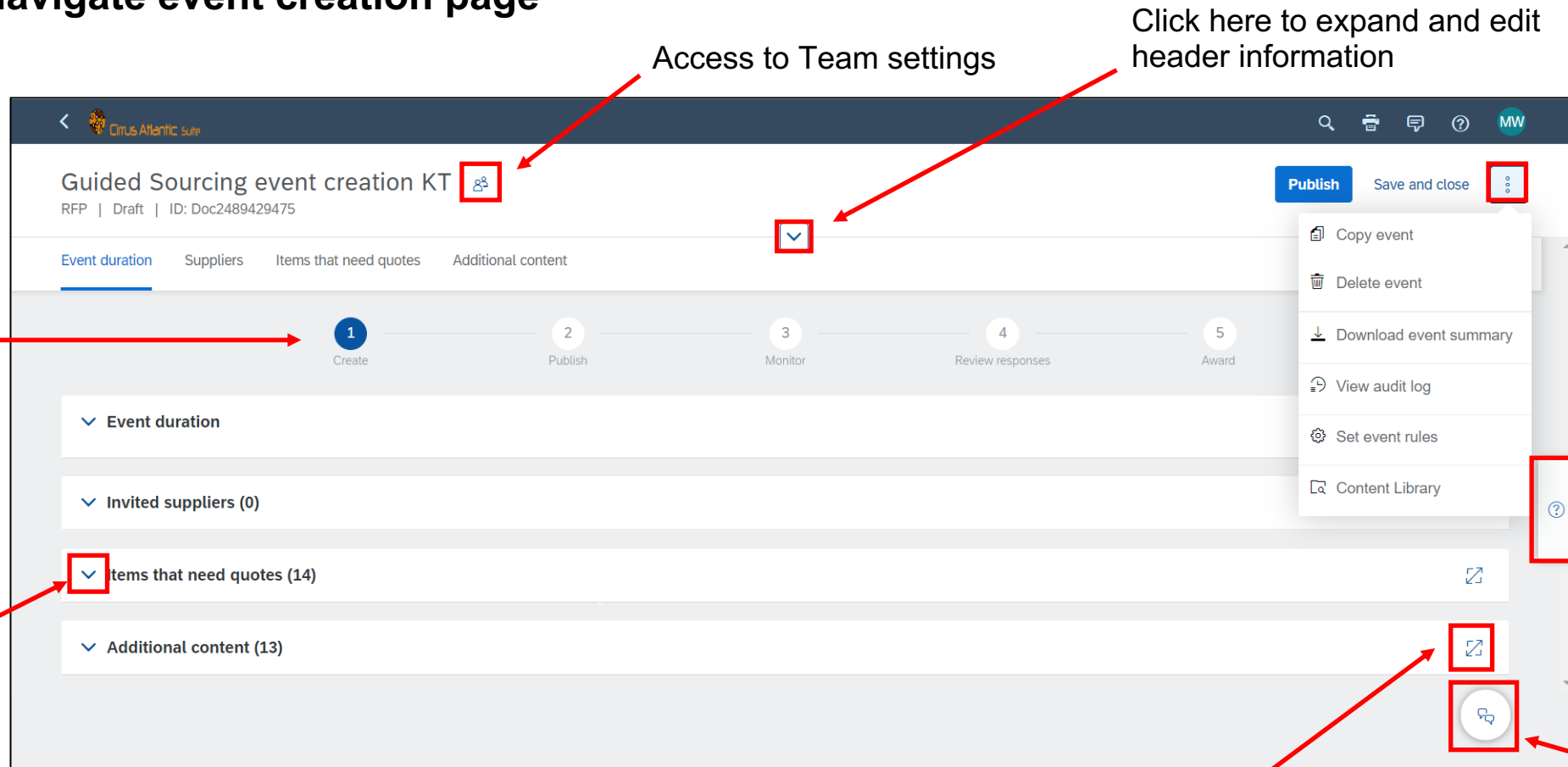
Access to Team settings

Click here to expand and edit header information

Click the Options menu for to access Audit log, Event rules and content library and other event actions

Guided sourcing process flow shows the steps of the sourcing process.

Collapsible sections

Click here to activate SAP Enable Now for in app guidance.

Open section to full screen for more viewable real estate

Access to messaging

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SAP Enable Now for in app guidance

- Users spend less time looking for documentation and more time creating events.

- Contextual help tiles provide users with information about capabilities

- Guided tours walk the user through process flows for key tasks within a screen.
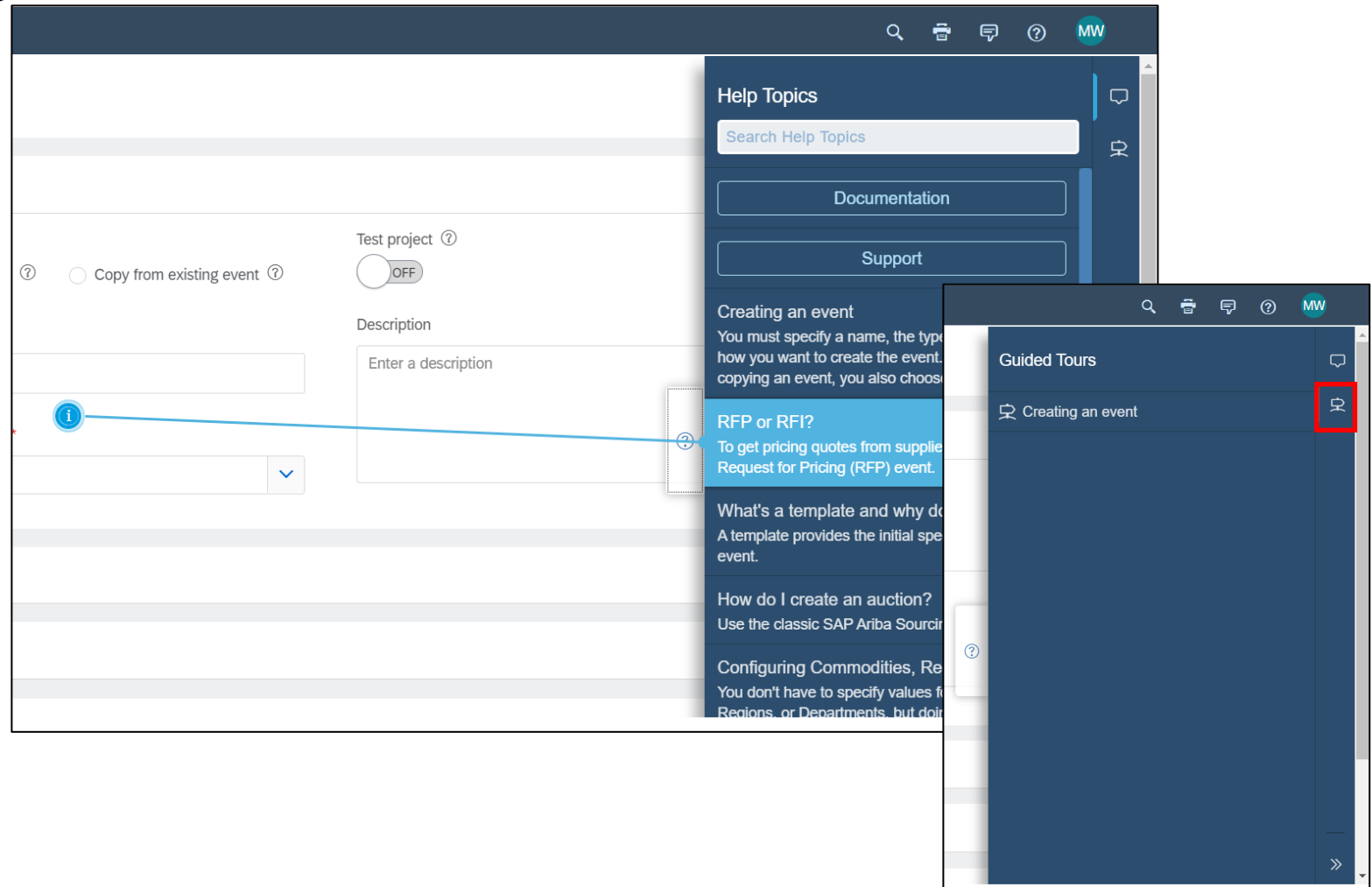
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How to add suppliers to an event

Search on multiple attributes

Click Create for new Supplier or Contact

Click Invite suppliers from the Invited supplier section.

| 1 |
| Create |

Event duration

Invited suppliers (0)

Invite suppliers   Uninvite

Organization name

Keyword   Search

For 14 items

Create
New Contact
New Supplier

Filters

Clear all

Suppliers (50+)

Qualification status

ation Rejected

DM Inspection Services Ltd
ID: VDR1023081 | Jakarta, ID | Tan Hyung

Preferred for **1**   Qualified for **1**   Qualification Started for **1**

Item	Category	Region	Department
N/A	Building inspection service	Japan	N/A

ified

ation Started

D DM Inspection Services Ltd
Jakarta

INFO   CONTACTS   QUALIFICATIONS   CERTIFICATIONS

Vendor ID   Status   Address
S1130705   Registered   Jakarta, 7654 ID

Profile
67% complete

ification

PTe Group
ID: VDR1024043 | Helsinki, FI | Jaakko Nousiainen

Preferred for **1**   Qualified for **1**   Qualification Started for **1**

g Qualification Approval

g Resubmit

ed

West Lake Service
ID: VDR1025008 | NY, US | John West

Preferred for **1**   Qualified for **1**   Expired for **1**   Qualification Started for **7**

Create new contact

Hover over different parts of the supplier tile to see pop ups with more details

Click on supplier name and a supplier info card will pop up with key supplier details

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Managing Invited suppliers

Search and full screen

Click on items to see which items supplier are invited to bid on and uninvite them if necessary

Click supplier name to access info card

Click menu button to uninvite or preview as a supplier

Click contact name to manage invited supplier contacts

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Managing Items that need quotes

Search and full screen

Add, Move Delete content. You also have the ability to drag items to rearrange them

Import / Export content via Excel

- + Add lot after
- + Add item after
- 🔍 Add items from library after
- + Add master data item
- + Add terms
- ✏ Edit item
- 📢 New messages
- 🗑 Delete item

Menu option gives access to add new content and also access messaging

Click on terms to edit them inline, click **See all options** to open Edit term screen

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Bulk Add and Edit of terms

Select items that you want to edit.

Select term and update the values you want to edit

Search for an existing term or create a new one to add to the line items

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Adding content from library
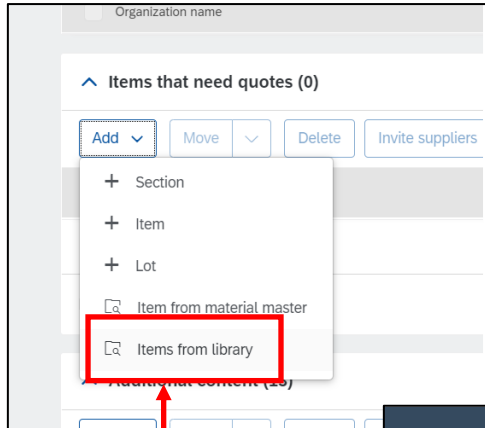
Select **Add** >> **Items from library**

or click the **Menu** option and select **Content library**
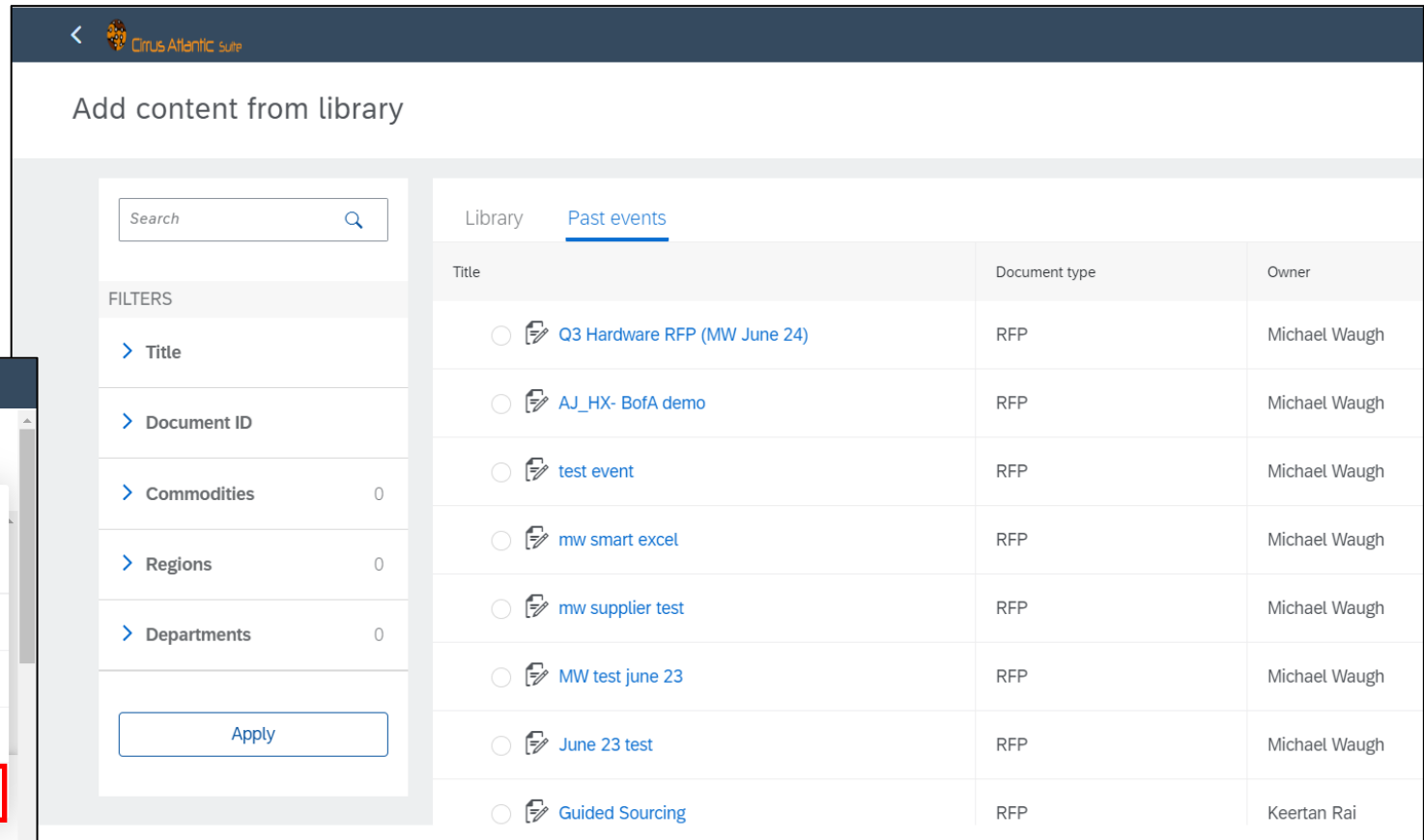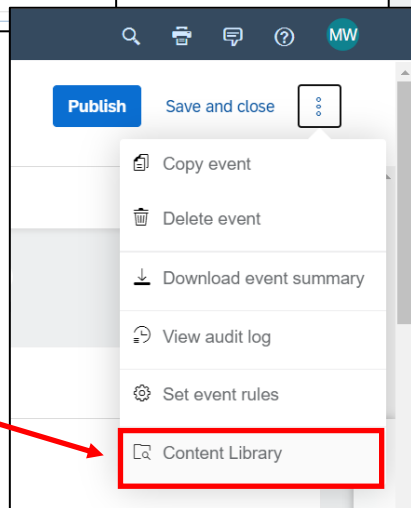
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Managing Additional content

Add, Move, Delete content. You also have the ability to drag items to rearrange them

Bulk edit question attributes

Menu option gives access to add new content and also access messaging

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Email Bidding

- Guided Sourcing supports email bidding. This allows suppliers to respond to event with out need to register on the portal.

- Suppliers will receive the offline bid sheet as an attachment to the "Event Invite" e-mail.

- Once they have updated the bid sheet with their responses they click "Email quote" to submit their bid.

- Bidding rule "**Allow participants to submit bids by email**" must be set to "**Yes**".

Cirrus Atlantic *Suite*

Email Bidding -- Full Event Excel bidding via email

Please review this RFP or RFI and submit your quote by email or visit the event page.
For any questions, contact [BUYER_EMAIL_ADDRESS]

[Email quote]   [Decline]   See event

By clicking Email quote and responding through email, you accept the bidder agreement (available on the event page) and consent to processing your name and email address by Cirrus Atlantic Suite for the purpose of a business relationship between Cirrus Atlantic Suite and your organization and agree to the storage, transfer and processing of your personal data by SAP according to the Terms of Use and Data Processing Agreement applicable to the SAP Ariba Sourcing solution.

Event ends Monday, February 24, 2020 at 11:38 AM, Pacific Standard Time

Bidding start date
Monday, February 24, 2020 at 11:08 AM, Pacific Standard Time
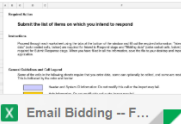
Region   Commodity

Currency
USD

Description
Email Bidding - Full Event Excel bidding via email

Offices | Data Policy | Contact Us | Customer Support

Powered by **SAP Ariba** ⋀

Bidding Rules

Allow surrogate bids when event is closed: ( ) Yes (●) No ⓘ

└ [Hidden ∨]

Allow participants to submit bids by email: ( ) Yes (●) No ⓘ

└ [Hidden]

When set to **Yes**, participants can submit bids by email for non-competitive events (**Must participants improve their bids** must be set to No).
If set to No, participants must log in to submit responses.
Note: When a supplier submitsÂ a response to the event through email, the response implicitly indicates that the supplier agrees to and accepts the terms specified in the bidder agreement sent as an attachment to the invitation mail.

Enable multi-round bidding: (●) Yes

└ [Delega]

Enable scoring on participant responses: ( ) Yes

└ [Delega]

Use transformation bidding format: No ⓘ

Bid Guardian percentage: ⓘ

Allow owner to change bid improvement rules at the lot level: Yes ⓘ

[X] Email Bidding -- F...

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Monitoring Event – Summary

Process monitor shows where you are in the event process.

Click the menu button to control the event and access audit logs, event summary

At a glance insight on supplier participation, Event duration and item coverage.

Click participation segment to see suppliers status and resend invite emails if required.

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Monitoring Event – Items that need quotes

Access Bid History and Bid Comparison reports

Show or Hide Initial and Historic values

Indicates if supplier is locked

Click menu option to hide, lock resend invitation or surrogate bid

Click to see reason that supplier did not respond

Control visibility of suppliers in table

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Monitoring Event –Additional content

Filter additional content

Add supplier visible comments on content

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Reviewing Responses – Award scenarios

Click menu button for additional actions including reopening the event and Creating a new Round

Review OOTB Award scenarios or Create a new Ad hoc Award scenario

Quick visual on how selected scenario compares to the Best Bid scenario

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Reviewing Responses – Custom scenario

Access Bid History and Bid Comparison reports

Click the menu button to Allocate all lines to selected supplier

Choose to allocate by percentage or quantity

Input award allocation

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Reviewing Responses – Create a new round

Select suppliers to exclude from the new round

Select Items to exclude from the new round

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Awarded Event - Creating Contract

Once event is Awarded you can create the follow on contract by click on the **Menu** option for the supplier and selecting **Create a contract for awarded items.**

Select Items to exclude from the new round

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Messaging

- New event level messaging functionality.
- Collaborate with both internal and external stakeholders
- Supports attachments
- Messages can be responded to from Ariba or via email.
- Easily accessibly from multiple parts of the event process.