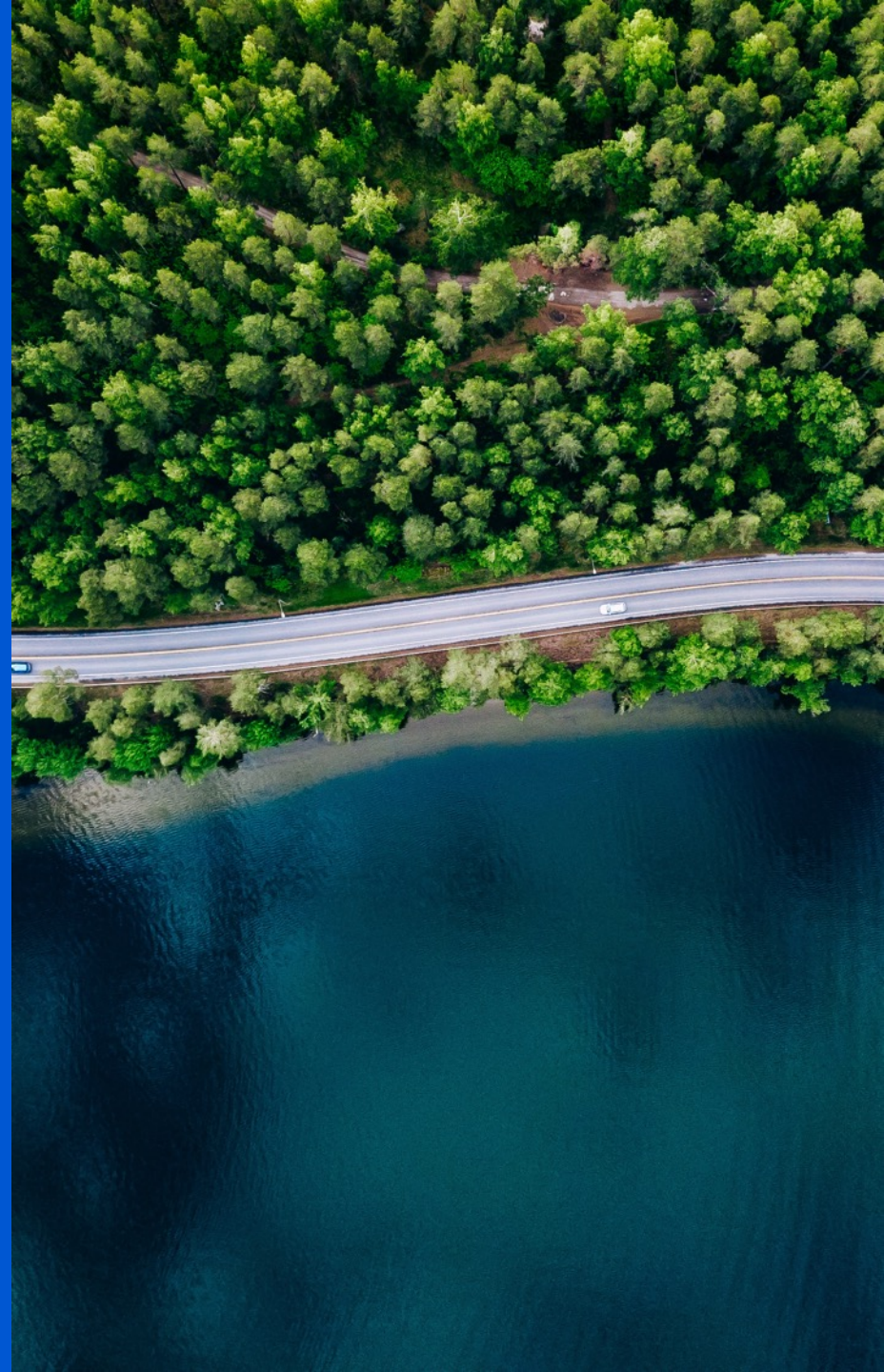


Guided Sourcing for SAP Ariba Sourcing Toolkit / Transition Deck



Toolkit Objective and Mission

Guided Sourcing Capability Overview

The objective of this toolkit and transition deck is to provide SAP Ariba Sourcing customers with the pertinent information to enable and adopt the guided sourcing capability through a persona based lens. This deck is designed for self-service and to act as a resource in a customers transition and adoption journey.



Content Menu

Guided Sourcing Capability Overview

- CPO Persona
- Guided Sourcing Essentials
- Guided Sourcing Overview
- Guided Sourcing Value

Enabling Guided Sourcing

- Admin User Persona
- How to enable Guided Sourcing
- What to do if Guided Sourcing is already enabled
- How to setup Guided Sourcing Templates

Guided Sourcing Changes

- Guided Sourcing User Persona
- Team Member Persona
- Supplier User Persona
- What has changed in Guided Sourcing

Guided Sourcing Integration & Roadmap

- Guided Sourcing Integration
- Guided Sourcing Roadmap



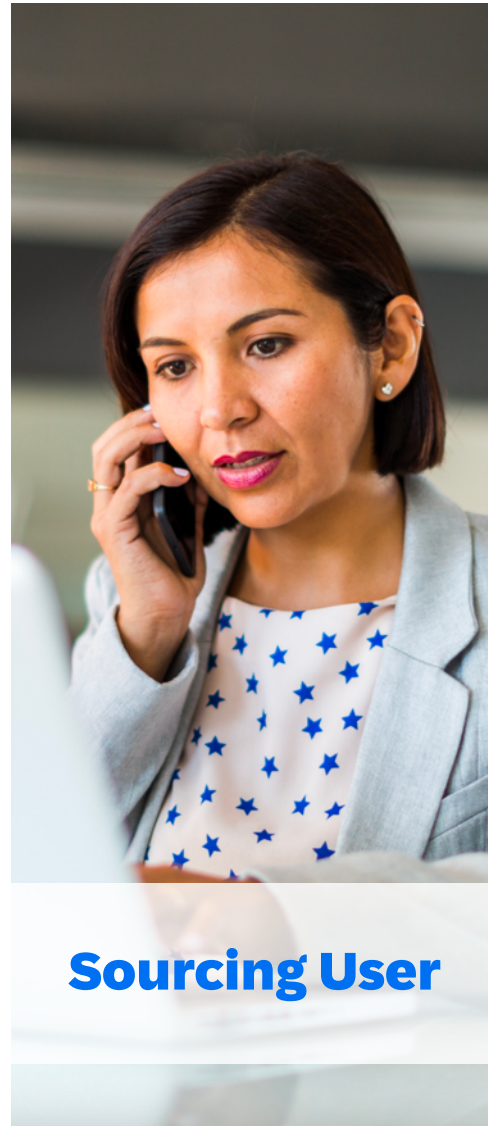
Guided Sourcing Capability Personas



CPO



Admins



Sourcing User



**Team &
Evaluators**



Suppliers

Guided Sourcing Personas & Changes

CPO



What Has Changed

- The new **For You** dashboard is available
- Enhanced in-system approvals
 - In-app document preview is now available

What Has Not Changed

- Email approvals remain in the system
- Email notifications will remain the same
- System generated reports remain the same

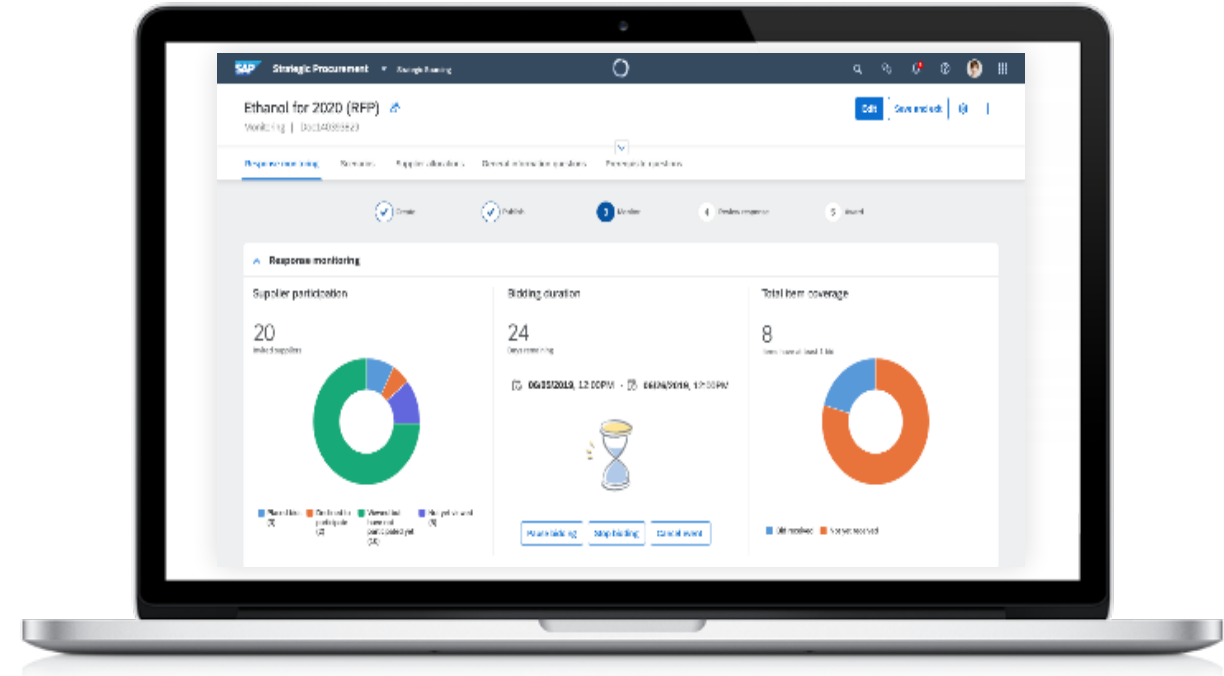
Need to Know

- Guided Sourcing Capability is the next-gen user interface that provides a streamlined and intuitive user experience for managing strategic sourcing processes and RFx events.
- Features are being continuously delivered into Guided Sourcing since Nov. 2020
- Innovations are only delivered into Guided Sourcing
- Guided Sourcing Capability is not a 1:1 copy of SAP Ariba Sourcing. The long-run growth of it is influenced and driven by our innovation themes for Guided Sourcing
- No cost to adopt, available as part of SAP Ariba Sourcing solution
- Sourcing Events created before the Guided Sourcing Move will have the option to continue that event in the Classic Sourcing UI. All new Sourcing Projects & Events will be created via Guided Sourcing

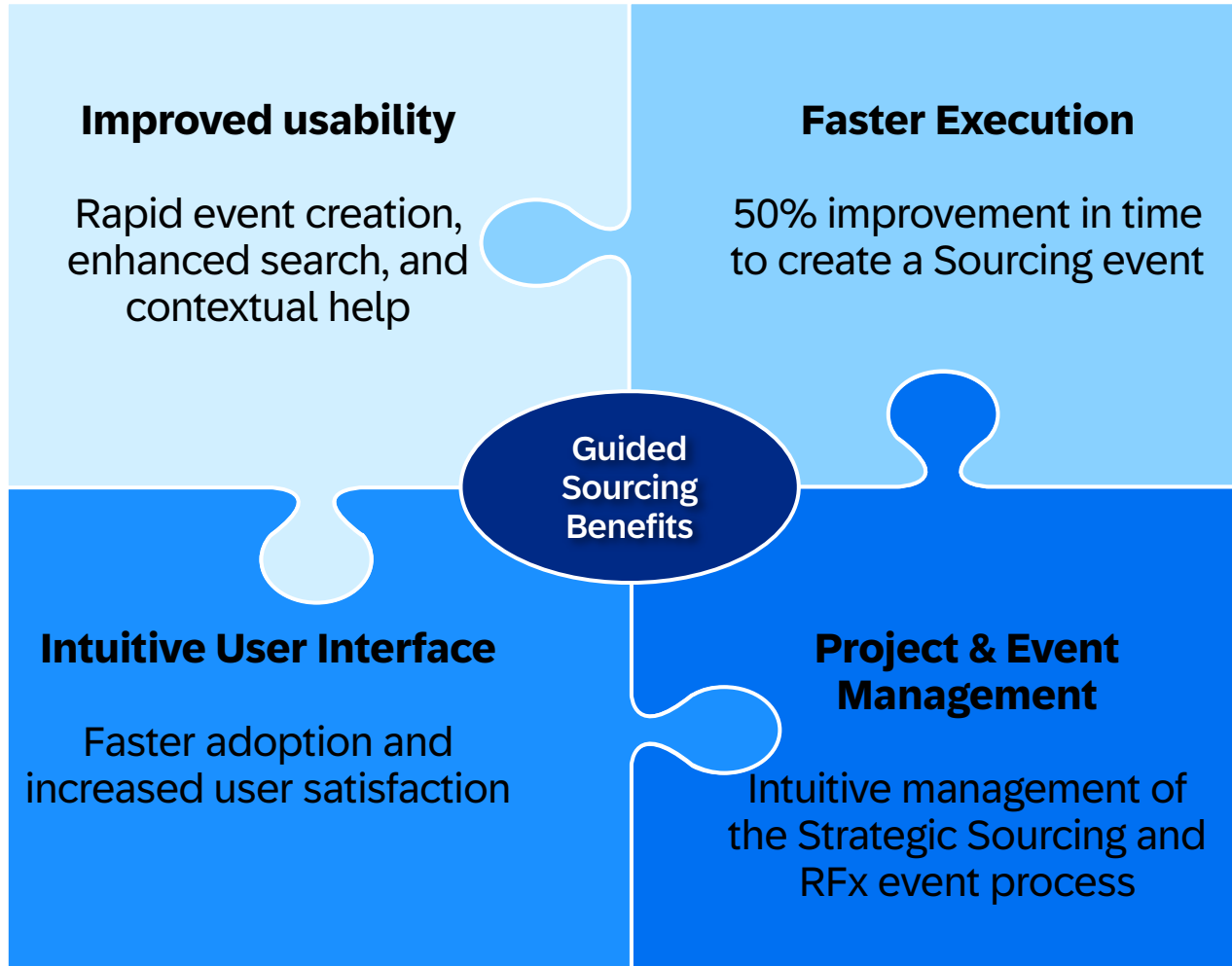
Guided Sourcing Overview

New functionalities:

- Intelligent recommendations on content and suppliers via AI/ML
- Single-page event creation and single-page project management
- Autonomous procurement features like Smart Excel Import to automate RFx event creation
- On-screen messaging capabilities within projects and events
- Multi-round bidding to facilitate the process from a long list to Best And Final Offer
- Pre-Award Contract Negotiation
- WalkMe – AI powered guidance and automation
- Advanced Bid Analysis engine
- Advanced Category planning with Category Management Integration



Guided Sourcing Realize the Value



Price Reduction

- Bottom-line results – Help achieve savings of up to 9.7%*
- Increase spend under management & savings opportunities
- Lower total cost of ownership – Software-as-a-service delivery with faster time to value and faster innovation
- 50% improvement in time to create an event
- Create sustainable organizational knowledge using analytics for in-context intelligence

Guided Sourcing Personas & Changes

Sourcing Administrator



What Has Changed

- New Sourcing Templates need to be managed
 - Additional parameters available compared to classic sourcing
- SAP Enable Now
- SAP WalkMe
- Pre-Award Negotiation
- Guided Sourcing AI/ML maintenance
- Guided Sourcing Integration with other systems will need to be reviewed
- Sourcing Project and Event layout and functionality has changed

What Has Not Changed

- Master Data management remains the same
 - Users/groups
 - Material Master
 - All other sourcing master data
- Team helper rule file remains the same
- Custom fields/enumerations management remains the same
- Template conditions remain the same
- Approval management remains the same

Enable Guided Sourcing



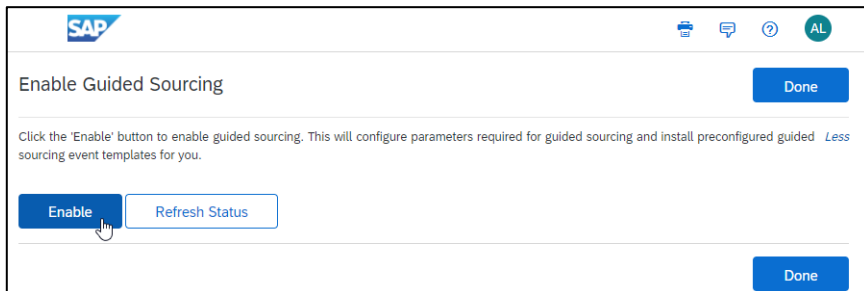
How to enable Guided Sourcing

Guided Sourcing can be enabled in your site without the need of SAP support or a support ticket - *Customer Administrator access is required*

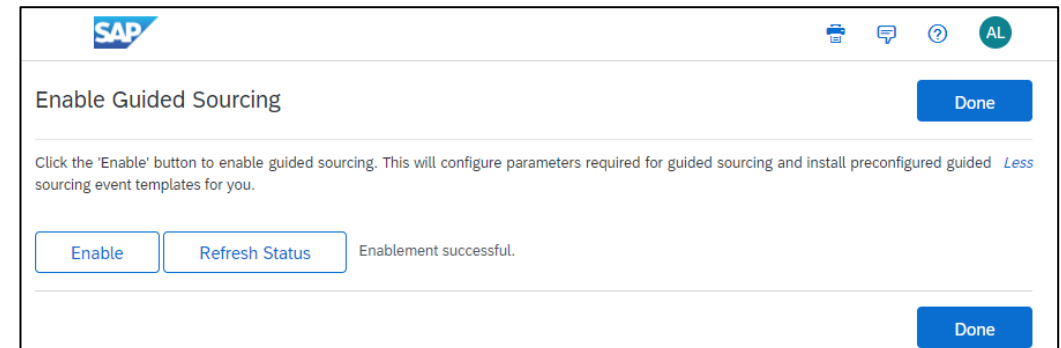
Step 1: Click **Manage > Administration > Event Manager > Enable Guided Sourcing**



Step 2: Click the **Enable** button



Step 3: The Task will automatically run and enable Guided Sourcing and out-of-the-box Guided Sourcing templates. After a few minutes, you will see an Enablement Successful next to the Refresh Status button.



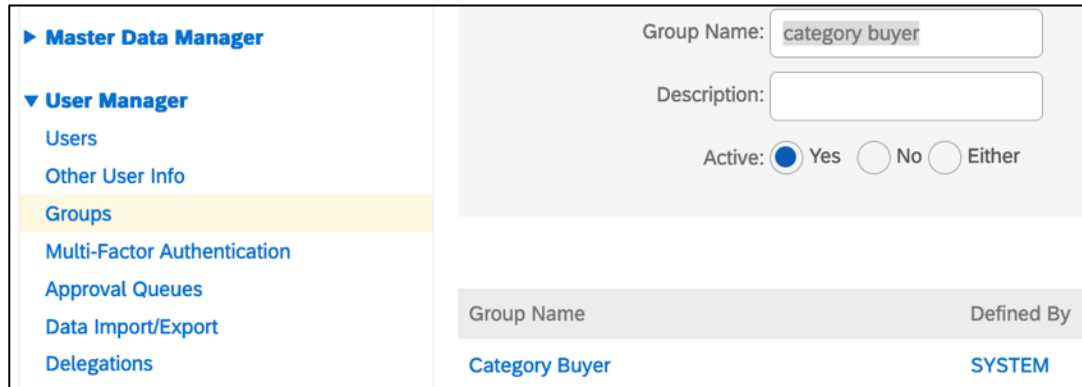
Step 4: Once Guided Sourcing is enabled you are required to setup Guided Sourcing Event & Project templates.

View the complete documentation on how to [Enable Guided Sourcing](#)

What to do if Guided Sourcing is already enabled?

Guided Sourcing may already be enabled in your site therefore, review the following steps to assign groups and update templates - *Customer Administrator Access is required*

Step 1: Assign the “**Category Buyer**” group to the Sourcing Users



Master Data Manager

User Manager

Users

Other User Info

Groups

Multi-Factor Authentication

Approval Queues

Data Import/Export

Delegations

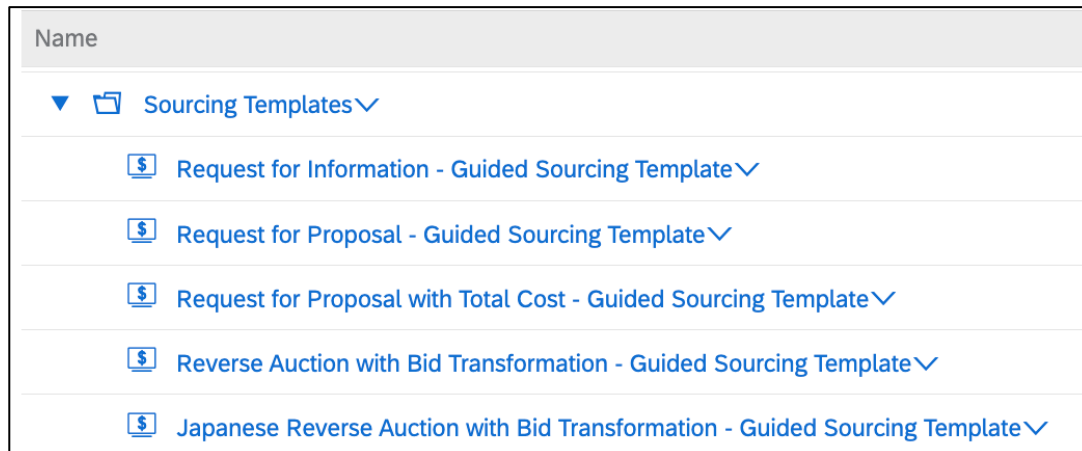
Group Name: category buyer

Description:

Active: ☒ Yes ☐ No ☐ Either

Group Name	Defined By
Category Buyer	SYSTEM

Step 2: Ensure the Sourcing Project / Event templates are setup accordingly - *template setup instructions are further in the deck*

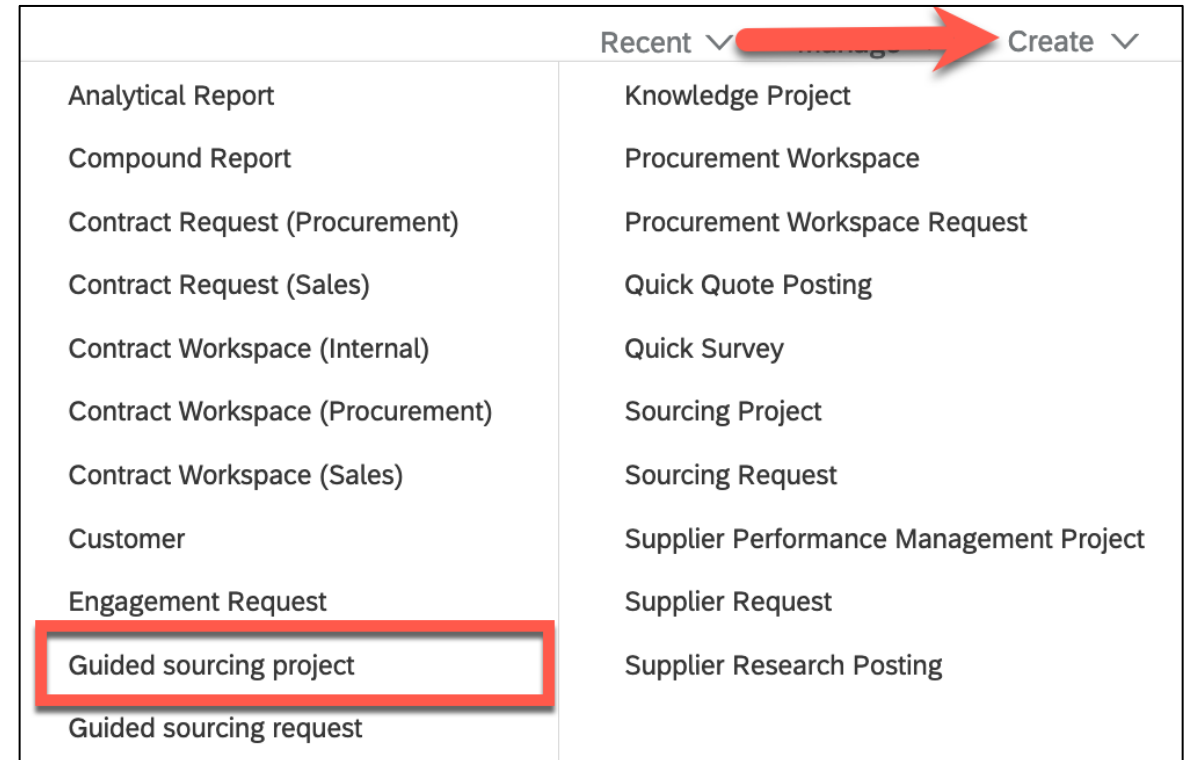


Name

▼ Sourcing Templates

- Request for Information - Guided Sourcing Template
- Request for Proposal - Guided Sourcing Template
- Request for Proposal with Total Cost - Guided Sourcing Template
- Reverse Auction with Bid Transformation - Guided Sourcing Template
- Japanese Reverse Auction with Bid Transformation - Guided Sourcing Template

Step 3: To validate if access to Guided Sourcing is enabled, from the Home-page click **Create** and **Guided Sourcing Request** and **Guided Sourcing Project** options should be visible



Recent ▼ Create ▼

Analytical Report	Knowledge Project
Compound Report	Procurement Workspace
Contract Request (Procurement)	Procurement Workspace Request
Contract Request (Sales)	Quick Quote Posting
Contract Workspace (Internal)	Quick Survey
Contract Workspace (Procurement)	Sourcing Project
Contract Workspace (Sales)	Sourcing Request
Customer	Supplier Performance Management Project
Engagement Request	Supplier Request
Guided sourcing project	Supplier Research Posting
Guided sourcing request	

How to enable Guided Sourcing AI/ML recommendation Engine

Guided Sourcing may already be enabled in your site therefore, review the following steps to enable Machine Learning and AI features - *Customer Administrator Access is required*

Step 1: Enable two parameters via Intelligent Configuration Manager (within Sourcing and Contracts menu -> Parameters):

- Enable GuidedSourcing.ContentRecommendations.Enabled
- Enable GuidedSourcing.SupplierRecommendations.Enabled

Parameters		
	Name and ID	Current value
<input type="checkbox"/>	> Enable content recommendations in guided sourcing events Application.AQS.GuidedSourcing.ContentRecommendation.Enabled	Yes
<input type="checkbox"/>	> Enable supplier recommendations in guided sourcing events Application.AQS.GuidedSourcing.SupplierRecommendation.Enabled	Yes

Configuration of Recommendations for Suppliers and Content in Guided Sourcing (SAP Help)

Step 2: Execute steps as per [Enablement of ML-powered Features - Video Guide](#)

Details available also in SAP documentation

Model Wizard	
	Enrichment Selection
1 Enrichment Selection	
2 Configure	<input type="radio"/> InvoiceDE
3 Train	<input type="radio"/> SupplierDE
4 Curation	<input type="radio"/> SSPInvoiceDE
5 Monitor	<input type="radio"/> ANInvoiceDE
6 Manage	<input checked="" type="radio"/> SourcingUnstructured
	<input type="radio"/> SupplierRecommendation
	<input type="radio"/> ContentRecommendation
	<input type="radio"/> IntelligentApproval



Enabling Smart Import and Intelligent Supplier Recommendations

Template Management



How to Create Guided Sourcing Templates

Guided Sourcing requires updated and / or edits to existing templates to reflect the sourcing process

Each event template now has a “**Guided Sourcing Template**” radio-button that defines the template as a guided sourcing specific template

Guided Sourcing
Template:

☐ Yes ☒ No

There are 3 options to create Guided Sourcing Templates:

Option 1: Leverage the system generated Guided Sourcing templates, ensure the-out of the box templates are adopted as a basis for your templates

Name

▼

Sourcing Templates▼

\$

Request for Information - Guided Sourcing Template▼

\$

Request for Proposal - Guided Sourcing Template▼

\$

Request for Proposal with Total Cost - Guided Sourcing Template▼

Option 2: Use your existing template setup process in Classic Sourcing, copy the existing templates and convert to a Guided Sourcing template

Option 3: Convert all your Classic Sourcing event templates by running the scheduled task ConvertToGuidedSourcingTemplateTask.

(As a “Customer Administrator” you can navigate to Manage->Administration->Site Manager->Scheduled Tasks. Search for the above task and Run it.)

The recommended approach is to copy each desired template instead of editing the existing out-of-the box templates –

Applicable to both Classic and Guided Sourcing templates.

If you have multiple event templates and you want to convert all of them, follow the option 3.

Once templates are copied ensure the radio-button is set to **Guided Sourcing Template = Yes**



How to convert classic event template into a Guided Sourcing event template



Guided Sourcing Personas & Changes

Sourcing User

What Has Changed

- New Guided Sourcing Project & Event UI
- The new **For You** dashboard is available
- In system approval UI has changed
 - In-app document preview now available
 - Sourcing event content and line items have been split into 2 sections
 - Multi-round events
 - Supplier & Content recommendations
 - Messaging app has been added to communicate with users
 - SAP Companion to assist with learning
 - Pre-Award Contract Negotiation
 - WalkMe – AI powered guidance and automation
 - Integration with Supplier Risk*
 - Integration with SAP Category Management*

What Has Not Changed

- Email approvals remain the system
- Email notifications will remain the same
- System generated reports remain the same
- Your sourcing process will remain the same (if template are migrated like for like)



Guided Sourcing End-to-End
Overview

What's Changed With Guided Sourcing?

Single Page Event Creation

mab GS Project Feb 2024 / Sourcing Events / mab GS Multi-Round RFP Feb 2024

mab GS Multi-Round RFP Feb 2024

Publish

Save and close

...

RFP | Draft | ID: Doc4431582703 | Project state: Active | Multi-round bidding enabled

Tasks

Event duration

Suppliers

Items that need quotes

Questions, requirements, and attachments

1

Create

2

Publish

3

Monitor

4

Review responses

5

Award

Suppliers (2)

Search

Q

↺

Invite suppliers

▼

Uninvite

↕

▼

⚙

<input type="checkbox"/>	Organization name	Actions	Contact name	Invited to bid ...	Risk le...	Is this an incumbent suppli...	Preferr...	Registration Stat...	Qualification	
<input type="checkbox"/>	MAB Supplier 2 AG	...	Friedrich Weinwurm	5 items	Low	No	<input type="checkbox"/>	No	Registered	Unknown
<input type="checkbox"/>	MAB Supplier 7 Ltd.	...	Thomas Mann	5 items		No	<input type="checkbox"/>	No	Invited	Unknown

Questions, requirements, and attachments (6)

Search

Q

↺

Add

▼

Move

Copy

Delete

Edit questions

Set weight

Manage conditions

⚙

↕

↕

↕

▼

⚙

<input type="checkbox"/>	Questions, prerequisites, requirements, and attachments	Actions	Response type	Initial Value	References
<input type="checkbox"/>	> 1.0 General Terms & Conditions Add description	...			
<input type="checkbox"/>	> 2.0 Questions Add description	...			

Items that need quotes (5)

Search

Q

↺

↕

↕

↕

▼

⚙

...

<input type="checkbox"/>	Items	Actions	Price	Quantity	
<input type="checkbox"/>	1.0 Apple Macbook pro 13" i5, 1TB, 8GB	...	Set initial value	100 each	
<input type="checkbox"/>	2.0 Apple Macbook pro 15" i5, 1TB, 17GB	...	Set initial value	50 each	
<input type="checkbox"/>	3.0 Lenovo Thinkpad T480 Touchscreen 14" i7, 8GB	...	Set initial value	100 each	
<input type="checkbox"/>	4.0 Lenovo Thinkpad X1 Carbonn 1 i5 16GB	...	Set initial value	30 each	
<input type="checkbox"/>	5.0 Dell XPS Touch 13" i7 8GB	...	Set initial value	100 each	<div>🔍</div>

Benefits

- Improved usability – event creation is visible on a single page
- Time reduction – almost 50% improvement in time to create an event compared to current Classic Sourcing UX
- Intuitive user interface for faster adoption



Watch this video to learn about Guided Sourcing Single Page Event Creation

What's Changed With Guided Sourcing?

Enhanced Item Management

Items that need quotes (5)

Search

Q

↺

Add

Move

Copy

Delete

Edit terms

Edit matrix

Add terms

Set weight

Set incumbent

📄

↓

↑

↕

⚙️

Items	Actions	Price	Quantity	Extended
<input checked="" type="checkbox"/> 1.0 Apple Macbook pro 13" i5, 1TB, 8GB	⋮	Set initial value	100 each	
<input checked="" type="checkbox"/> 2.0 Apple Macbook pro 15" i5, 1TB, 17GB	⋮	Set initial value	50 each	
<input type="checkbox"/> 3.0 Lenovo Thinkpad T480 Touchscreen 14" i7, 8GB	⋮	Set initial value	100 each	
<input type="checkbox"/> 4.0 Lenovo Thinkpad X1 Carbonn 1 i5 16GB	⋮	Set initial value	30 each	
5.0 Dell XPS Touch 12"				

Mass edit

General attributes

Term attributes

Search term attributes

Q

Extended Price

Apple Macbook pro ..., Apple Macbook pro ... +3 Items

Price

Apple Macbook pro ..., Apple Macbook pro ... +3 Items

Quantity

Apple Macbook pro ..., Apple Macbook pro ... +3 Items

Savings

Apple Macbook pro ..., Apple Macbook pro ... +3 Items

INITIAL VALUES *

100 each

RULES

Can participants see this term?
Yes

Is a response required?
Yes, an event owner must respond - participants cannot respond

Is term editable in alternatives?
Not Editable

Items selected: 5

Apply Cancel

Benefits

- Enhanced search capabilities
- Bulk edit capabilities reduces the need to export data to excel to make changes
- Reduced scrolling when in Full Screen mode resulting in less ‘clicks’



Watch this video to learn about Guided Sourcing Enhanced Item Management

What's Changed With Guided Sourcing?

Intelligent Supplier Recommendation & Supplier Information

Event duration

Suppliers

Items that need quotes

Questions, requirements, and attachments

Suppliers (2)

i

We have 6 supplier recommendations. [Add suppliers from recommendations](#)

x

Add suppliers

Remove

Search

Q

<input type="checkbox"/> Supplier name	Contact name	Invited to bid on
<input type="checkbox"/> Zag Professional Services	...	11 items
<input type="checkbox"/> Zagorac Industries	...	11 items

Add recommended suppliers

We've found these suppliers based on your past events with similar line items, commodities, regions, and departments; if similar contracts exist, they are also used in the recommendation.

Search by supplier name, or Supplier ID

Q

All recommended suppliers (6)

<input type="checkbox"/>	Supplier name	Recommended for	Supplier ID	Contacts
<input type="checkbox"/>	Digistorage - Test	Items: 11	S1970	
<input type="checkbox"/>	Good Bull, Inc.	Items: 11	S1967	
<input type="checkbox"/>	FAB Associates	Items: 11	S1971	
<input type="checkbox"/>	BMK Industries	Items: 4	S1969	BMK Industries - Sup..

Add

Cancel

Benefits

- Guided Sourcing allows users to efficiently add suppliers to the sourcing events
- Machine learning intelligently suggests suppliers to add to the event by learning your organization's sourcing event tendencies including commonly sourced goods and previously selected suppliers – Capability does not eliminate or affect the current ‘traditional’ method of adding suppliers
- Reduction in time searching for suppliers



Watch this video to learn about Intelligent Supplier Recommendations

What's Changed With Guided Sourcing?

Intelligent Content Recommendations

The screenshot displays a web interface for Guided Sourcing. At the top, a header reads "Questions, requirements, and attachments (0)". Below this is a blue notification bar with an information icon and the text "We have content recommendations. Add content from recommendations". A toolbar contains buttons for "Add", "Move", "Delete", "Edit", and "More". A search bar is visible on the right. A modal window titled "Add recommended content" is open in the foreground. It features a lightbulb icon and the text: "We've found these content items based on your past events with similar line items, suppliers, commodities, regions, and departments." The modal lists "All recommended content (18)" and shows a scrollable list of items, each with a checkbox and a count of previous events it was added to. The items are:

- ☒ Provide your firm's federal employer identification number: Added to 62 previous events
- ☒ Are the owner(s) of the firm United States citizens? Added to 315 previous events
- ☒ Percentage of your customers that you service on a national basis? Added to 96 previous events
- ☒ Name of parent company, if any: Added to 62 previous events
- ☐ Discuss the nature of the professional services offered through your company (i.e. consulting resources on-site at client location, dedicated project management resources, shared enrichment experts). Added to 118 previous events
- ☐ What specific services from the following list can your firm provide? Added to 75 previous events

At the bottom of the modal are "Add" and "Cancel" buttons.

Benefits

- Similar with recommendations on suppliers, system is able to actively suggest also content
- Guided Sourcing can recommend the inclusion of questions / content in the Sourcing Event based on event items and suppliers from similar and / or past events.
- Intelligent recommendations can be based on item names, event names, department, commodity, region, invited suppliers



Watch this video to learn about Intelligent Content Recommendations

What's Changed With Guided Sourcing?

Custom Actions Menu

Edit Template Custom Actions Menu Settings

Edit template for custom actions menu settings

Custom Actions Menu Settings

Configure custom actions menu for quick access to other applications

Enable custom actions menu: ☒ Yes ☐ No

Menu name:

Menu option: URL: Enable in: Allow external content: ☒ Yes ☐ No

Tasks

Search

New Custom Actions

<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or review
<input type="checkbox"/>	Add Team Members	To do	Not Started	PO Project Owner		
<input type="checkbox"/>	Draft RFP	To do	Not Started	PO Project Owner		
<input type="checkbox"/>	Approval For Award for NZ GS RFP*	Approval for award	Not Started	PO Project Owner		NA Naser Al Ze

Events and other documents

Search

New Custom Actions

Create

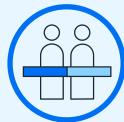
Up

<input type="checkbox"/>	Folders and documents	Type	Version	Status	Owner	Last modified on
<input type="checkbox"/>	NZ GS RFP	Event	v1	Not Created	PO Project Owner	Feb 9, 2024

Drag a file here or browse to upload (< 100 MB).

Benefits

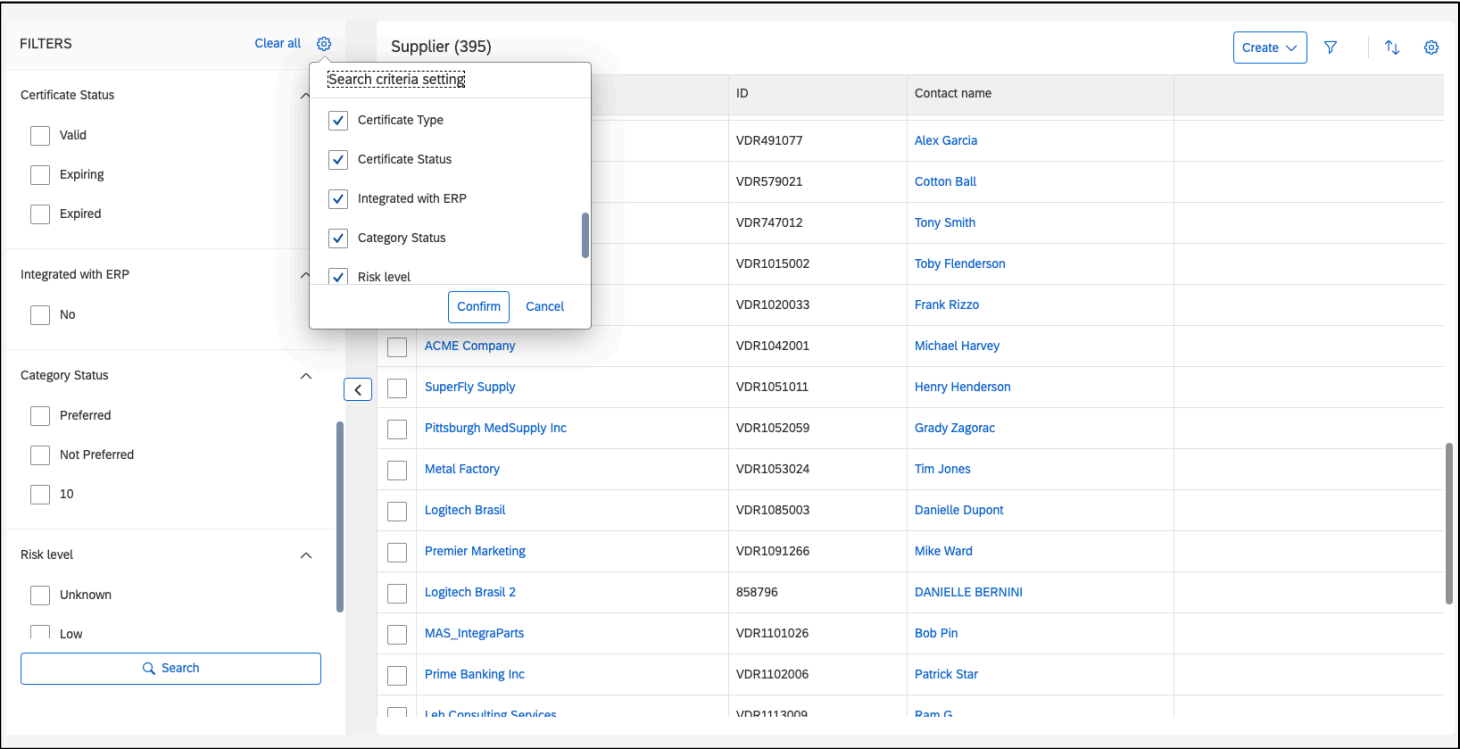
- Improves workflow efficiency and user experience by providing convenient access to specific actions
- Defining the placement and appearance of the custom actions menu allows for a customized navigation experience
- Integration of internal and external application URLs streamlines workflow management by directly linking users to relevant tools or resources



Learn how to configure Custom Actions Menu in Guided Sourcing Full Project Templates

What's Changed With Guided Sourcing?

Custom Supplier Search Filters



Benefits

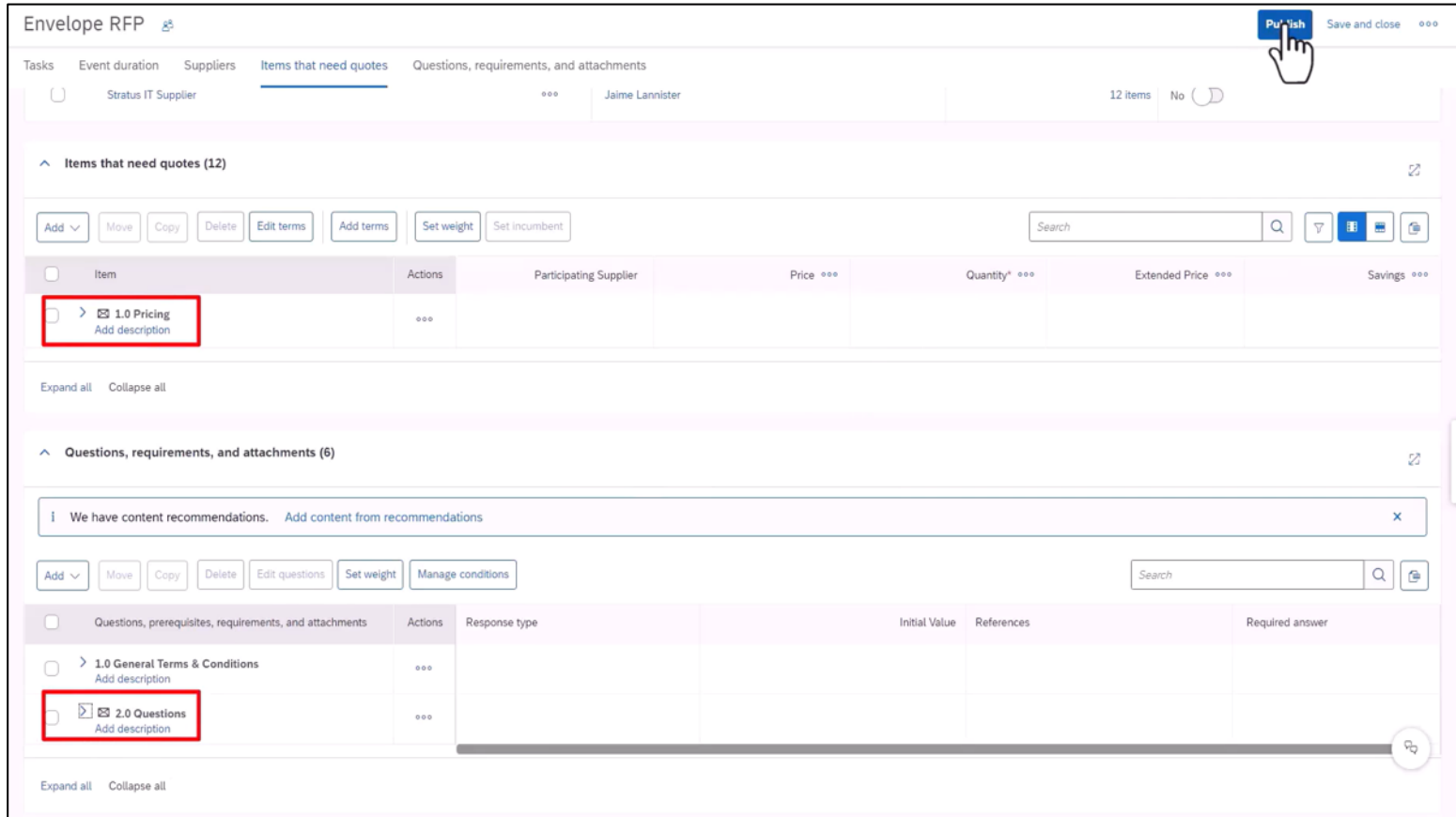
- Integration of custom filters from SAP Ariba Supplier Lifecycle and Performance enhances search and filtering capabilities in guided sourcing.
- Various filter types are supported, catering to a wide range of data types and criteria, offering flexibility in filtering options.
- Users can activate and prioritize search filters seamlessly, ensuring a tailored and efficient filtering experience within guided sourcing events.



Custom Filters from SAP Ariba Supplier Lifecycle and Performance in Guided Sourcing

What's Changed With Guided Sourcing?

Enhanced Envelope Bidding



Envelope RFP

Tasks Event duration Suppliers **Items that need quotes** Questions, requirements, and attachments

Stratus IT Supplier *** Jaime Lannister 12 items No

Items that need quotes (12)

Add Move Copy Delete Edit terms Add terms Set weight Set incumbent

Search

Item	Actions	Participating Supplier	Price ***	Quantity* ***	Extended Price ***	Savings ***
> 1.0 Pricing Add description	...					

Expand all Collapse all

Questions, requirements, and attachments (6)

We have content recommendations. Add content from recommendations

Add Move Copy Delete Edit questions Set weight Manage conditions

Search

Questions, prerequisites, requirements, and attachments	Actions	Response type	Initial Value	References	Required answer
> 1.0 General Terms & Conditions Add description	...				
> 2.0 Questions Add description	...				

Expand all Collapse all

Benefits

- Authorize certain Teams to Open Envelopes, ability to keep the Rejected Envelope Bid
- Allow Rejected Envelope Bids to Be Opened
- Prevent opening the last envelope until consensus grades are submitted for previous envelopes
- Allow terms of an item to be in separate envelopes
- Send Notifications to project team members when they can open their assigned envelope



Documentation on
Envelope Bidding in Guided
Sourcing Events

What's Changed With Guided Sourcing?

Multi-Round Events

Create a new round

Event starts
Thu, 8 Feb, 2024, 1:15 PM GMT+1

Event ends

Date

Duration

1

Hours

Choose suppliers and items for the new round.

Search

Search Suppliers

5 items and 4 terms	MAB Supplier 7 Ltd.	MAB Supplier 2 AG
<div>1.0 Apple Macbook pro 13" i5, 1TB, 8GB</div> <div>Price</div> <div>✕ Exclude from new round</div>	<div>€2,000 EUR</div> <div>Rank 2 122.2%</div>	<div>€900 EUR</div> <div>Rank 1 Lowest</div>
<div>2.0 Apple Macbook pro 15" i5, 1TB, 17GB</div> <div>Price</div>	<div>€1,800 EUR</div> <div>Rank 1 Lowest</div>	<div>€1,900 EUR</div> <div>Rank 2 5.6%</div>
<div>3.0 Lenovo Thinkpad T480 Touchscreen 14" i7, 8GB</div>		

Done

Benefits

- Run multiple rounds of the same event to receive the best prices from suppliers
- Add and exclude suppliers and items between rounds
- New configurable bid comparison report

mab GS Multiround RFP Feb 2024

Award Close

RFP | Review responses | ID: Doc443530507

Round 2

Rounds Summary

Tasks

Award scenarios

Associated Contracts

Allocate awards

Questions, requirements, and attachments

Messages

Create

Publish

Monitor

Review responses

Award

Rounds Summary

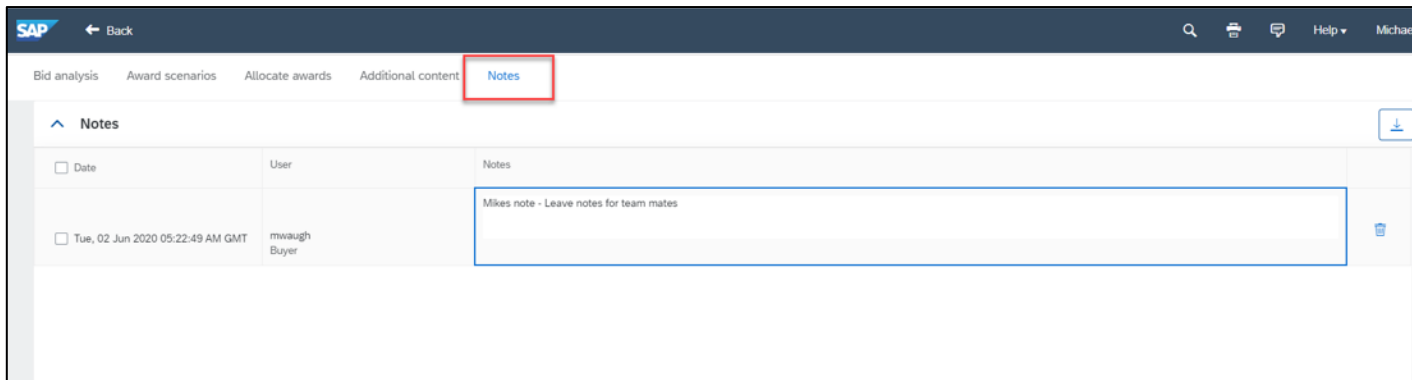
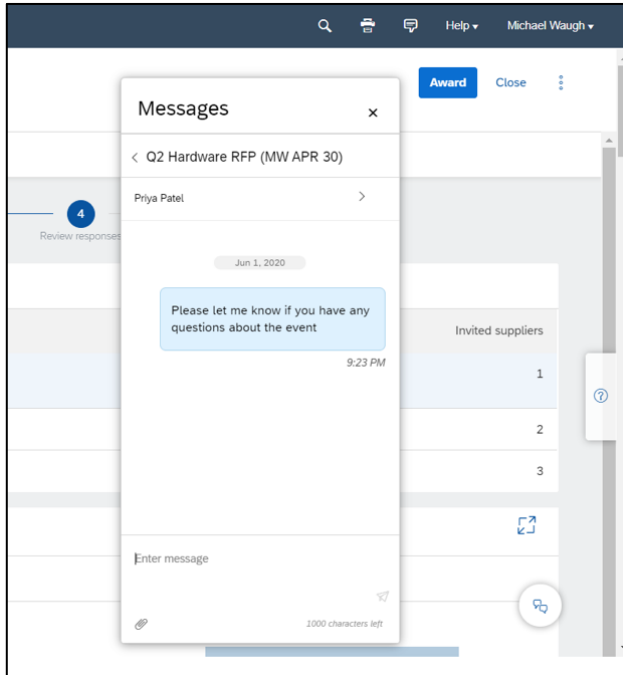
	Round	Items	Item coverage	Invited suppliers
Active	2	5	100%	2
	1	5	100%	2



Watch this video to learn about Multi-Round Bidding in Guided Sourcing

What's Changed With Guided Sourcing?

Collaboration and Messaging



Benefits

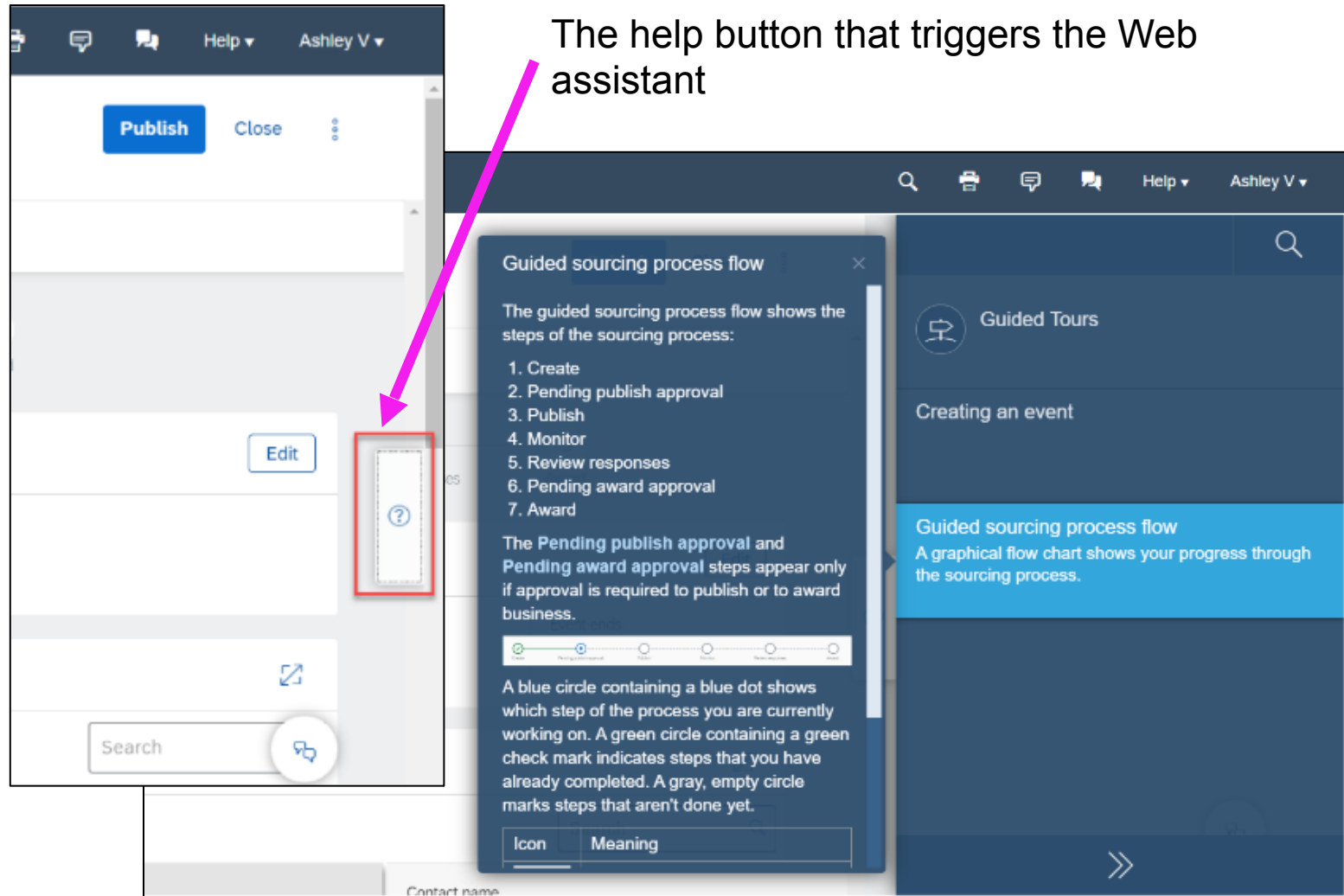
- Event level messaging functionality
- Collaborate with both internal and external stakeholders
- Supports attachments
- Messages can be responded to from Ariba or via email
- Leave notes for team members when working collaboratively



Watch this video to learn about Messaging in Guided Sourcing

What's Changed With Guided Sourcing?

Support – SAP Companion (Enable Now)



Benefits

- Guided Tours walk the user through process flows for key tasks within a screen
- Contextual help tiles provide users with information about capabilities, based on the particular screen
- Less time looking for documentation and more time creating events



Watch this video to learn about Enable Now for End Users



Watch this video to learn about Enable Now Admins

What's Changed With Guided Sourcing?

Pre-Award Negotiation

Associated Contracts

Close

Baseline Contract

Search

Create Baseline Contract

Document Title	Contract Status (ARIBA)	Contract Status (ICERTIS)	SAP Ariba ID	Icertis ID	Effective Date	Expiration Date	Update
New BaseLine Contract	Closed		CW4457		Feb 14, 2024		Update
Baseline Contract Workspace (Procurement)	Draft		CW4481		Feb 19, 2024		Update

Supplier Contract

ContractsCreation History

Search

Create Contract

Supplier	Document Title	Contract Status	Contract Status (ICERTIS)	SAP Ariba ID	Icertis ID	Effective Date	Expiration Date	Last Modified Date	Update
CMX Technology	CMX Technology (sid501)_SS_SCTC-21415_1716792642229CW	Draft		CW8370		Feb 23, 2024			Update

Review Legal ContractDoc13649203 - BiddingCancel

Checklist

1. Review Event Details

2. Review and Accept Prerequisites

3. Review Legal Contract

4. Select Lots/Line Items

5. Submit Response

A copy of the legal document in the associated baseline contract is listed in the table below. Download the document to review the contract terms and conditions.

Legal Contract

Contract Name	
KP_CW_1	Download

Cancel

Benefits

- Engage and negotiate contractual terms in a guided sourcing project
- Create baseline and supplier contracts in a guided sourcing event
- Suppliers can download the contract before submitting their response

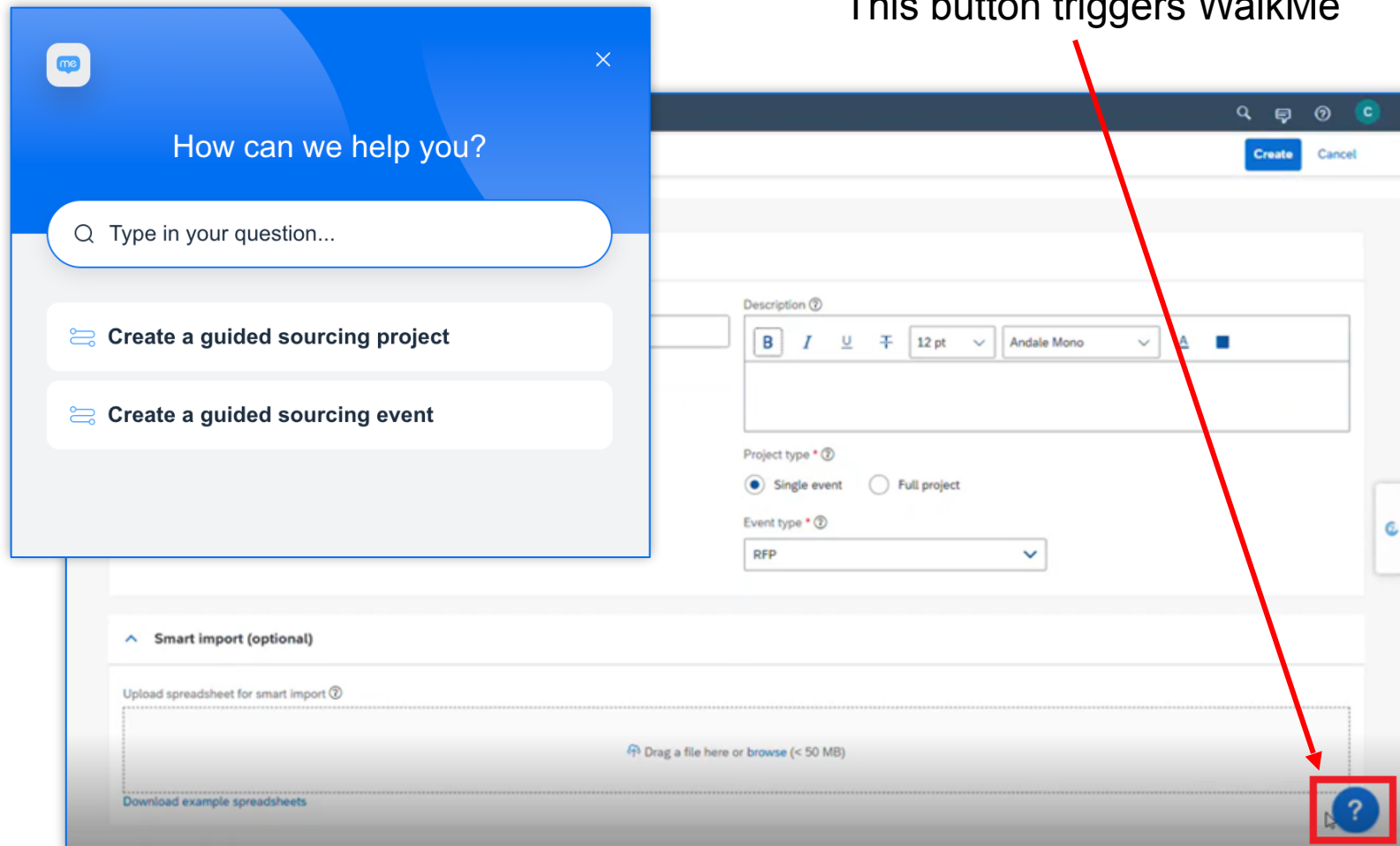


View product documentation on Pre-Award Negotiation in Guided Sourcing

*for customers who also have SAP Ariba Contract Management licensed and implemented

What's Changed With Guided Sourcing?

WalkMe – AI powered guidance and automation



This button triggers WalkMe

Benefits

- Easy-to-understand guidance powered by WalkMe.
- Accelerate user adoption
- Boost productivity
- Maximize value



View product documentation on WalkMe in Guided Sourcing

What's Changed With Guided Sourcing?

Auto invite preferred suppliers*

Office Equipment_Geneva_Expand Go_2023

RFP | Draft | ID: Doc998636332 | Multi-round bidding enabled

Tasks | Event duration | Suppliers | Questions, requirements, and attachments | Items that need quotes

1 Create | 2 Publish | 3 Monitor | 4 Review responses | 5 Award

Tasks

Event duration

Suppliers (2)

We have 1 supplier recommendations. Add supplier recommendations

You are automatically inviting preferred suppliers to this event.

Invite suppliers | Uninvite

Supplier name	Contact name	Invited to bid on	Is this an incumbent supplier?	Preferred	Registration Status	Qualification Status	Auto-Invited
<input type="checkbox"/> Flying Dutchman Company	*** Priya Patel +1	3 items	No <input type="checkbox"/>	Yes	Not Invited	Qualified	Yes
<input type="checkbox"/> Uk-MRO Limited	*** Richard Xu +1	3 items	No <input type="checkbox"/>	Yes	Not Invited	Qualified	Yes

Questions, requirements, and attachments (0)

Items that need quotes (3)

*for customers who also have SAP Ariba Supplier Lifecycle Management licensed and implemented the preferred supplier setting

Benefits

- Leverage the benefits of SAP Ariba Supplier Lifecycle Management / Strategic Sourcing Suite
- Expedite the tender creation process




Watch this video to learn about automatically inviting Preferred Suppliers

What's Changed With Guided Sourcing?

Smart Excel Import

Upload Excel file for smart import


Import to draft eventReturn to event



Upload an Excel file and we will map your entries to items and terms.

- To change the term or create a new term for a column, click the more options icon next to the column name.
- The bar below the column (term) name is color coded according to the confidence level of the mapping. Green = high, yellow = medium, red = moderate to low.

Click **Import to draft event** to add your entries to the event and continue editing your event. The entries you import overwrite any existing content.

 Excel file imported and contents mapped to the template or system terms. Multiple matches found for the following terms:
1) Item Name 2) Price 3) Quantity

Items to import

North America Component List - Buyer Import.xls

Line Items

Search

Item Name Mapped to Item Na...	Price Mapped to Price	Raw Material Cost New term	Overhead Cost New term	Quantity Mapped to Quantity
Component 1				100
Component 2				100
Component 3				100
Component 4				100
Component 5				100
Component 6				100
Component 7				100
Component 8				100

Benefits

- Speed up event creation by using your own Excel-based bid sheet to create line items
- Guided Sourcing interprets the data from unstructured Excel and maps to global or template items and item terms
- AI-suggested mappings can be reviewed and revised by user



Watch this video to learn about Smart Import from Excel

What's Changed With Guided Sourcing?

'For You' dashboard

HOME SOURCING CONTRACTS PROCUREMENT **FOR YOU** MORE... Recent Manage

For You

Search all visible feeds

Approval For Publish MRO 2024 Sourcing: Ready For Approval

Jan 10, 2024, 11:46:07 AM

Assigned to Owner

Approve Reject

Approval for Team Grading for RFP Event RFP Event: Ready For Apr...

Apr 27, 2023, 3:19:01 PM

Status Owner

Ready For Approval

Approve Reject

Quick links

- + Create sourcing project
- + Create sourcing request
- RFX
- Full projects
- Sourcing requests
- Manage templates

Expiring contracts

- FF IT Purchase Agreement - Approval - CJM032023
13 days left
- SD FL Services
35 days left

Benefits

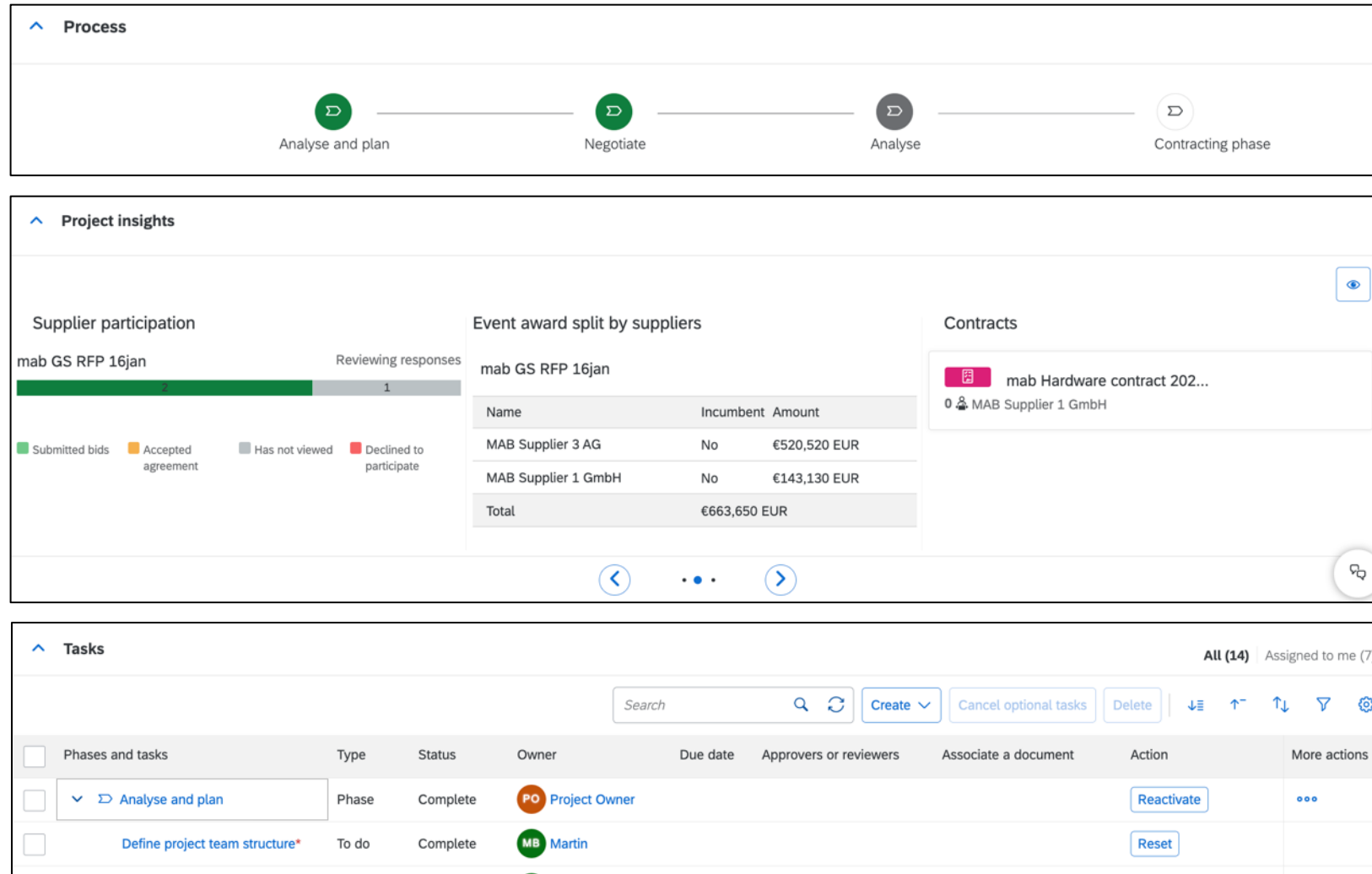
- Efficiently view Sourcing activity throughout the organization
- Approvers can approve or reject directly from the 'For You' tab or click into the project for more information
- Initiate project searches, new Sourcing Requests or kick off a new project from the 'For You' tab



Watch this video to learn about the new 'For You' tab in Guided Sourcing

What's Changed With Guided Sourcing?

Process and Project Insights in Full Project

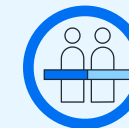


Benefits

- The Process panel provides a simple visual way to track the progress of a project
- Project Insights provides a visual summary of the status of different project components, such as event or associated contract.
- Customizable by administrator on a template level



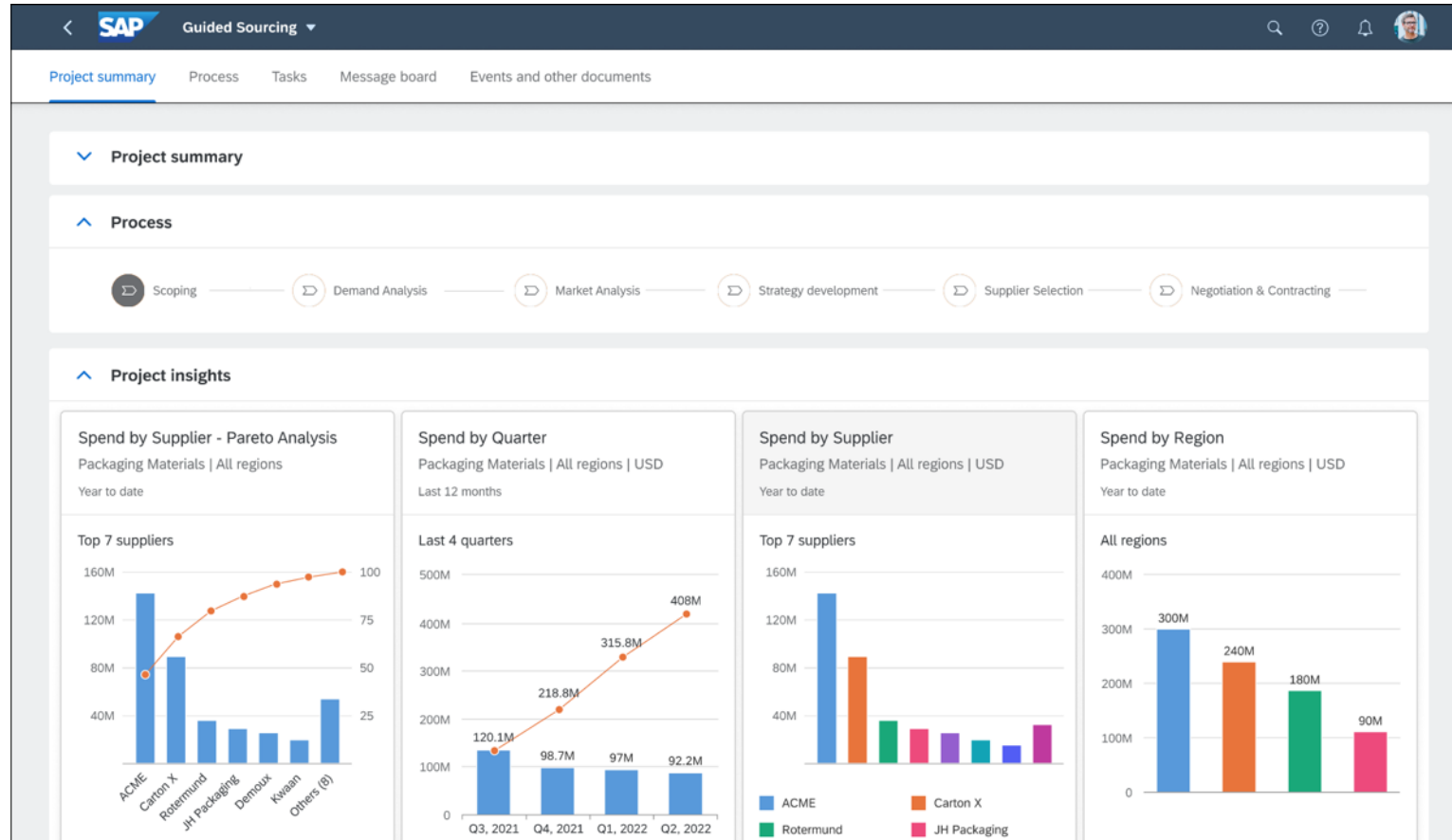
Documentation on Guided Sourcing Full Project Process Panel



Documentation on Guided Sourcing Insight Tiles

What's Changed With Guided Sourcing?

Category Management Integration



Benefits

- Automated Category Spend Profile
- Guided process for Strategy and Plan Development
- Monitor Strategy Execution
- Integration to Guided Sourcing: Ability to trigger projects from category management initiatives

Prerequisites:

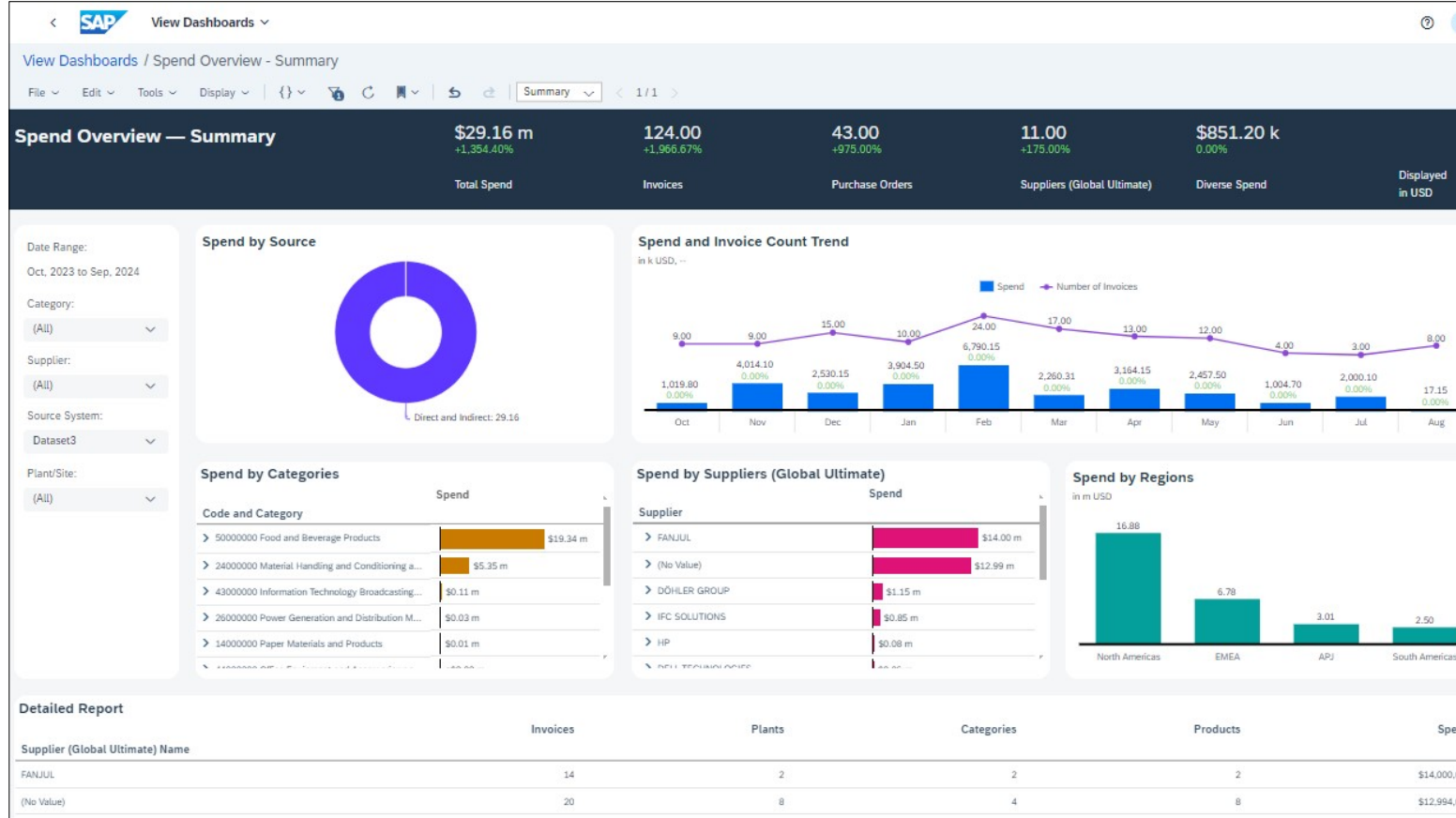
- ✓ License
- ✓ Customer must be hosted in a EU or US Datacentre



Watch this video to learn about Category Management

What's Changed With Guided Sourcing?

Spend Control Tower Integration



Benefits

- Intuitive, preconfigured spend performance dashboards with relevant KPIs
- Spend categories analyzed and optimized by machine learning models
- SAP and non-SAP source data captured and merged into a single source

Prerequisites:

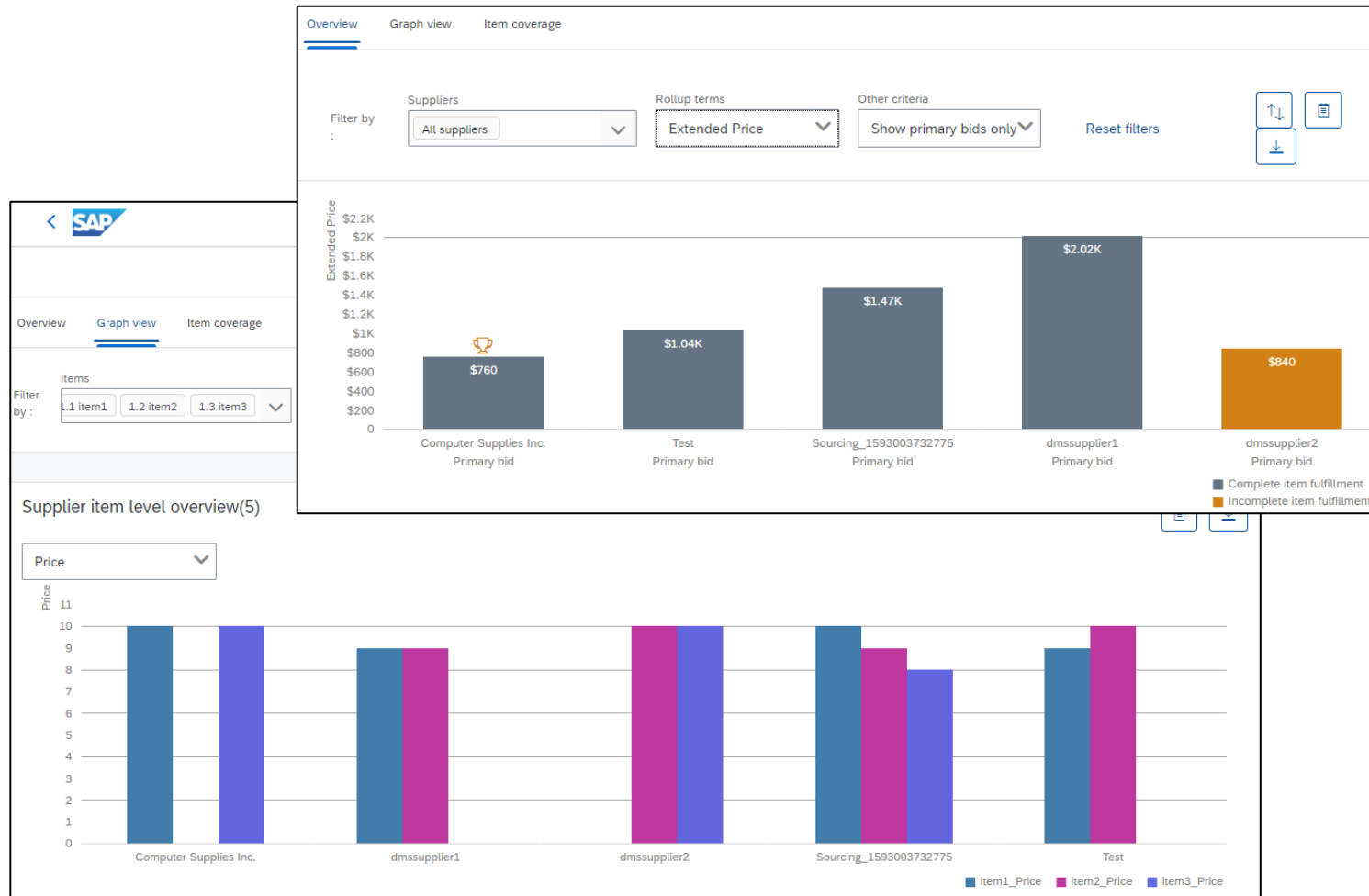
✓ License



Watch this video to learn about Spend Control Tower

What's Changed With Guided Sourcing?

Advanced Bid Analysis



*at this stage only available for single round events

Benefits

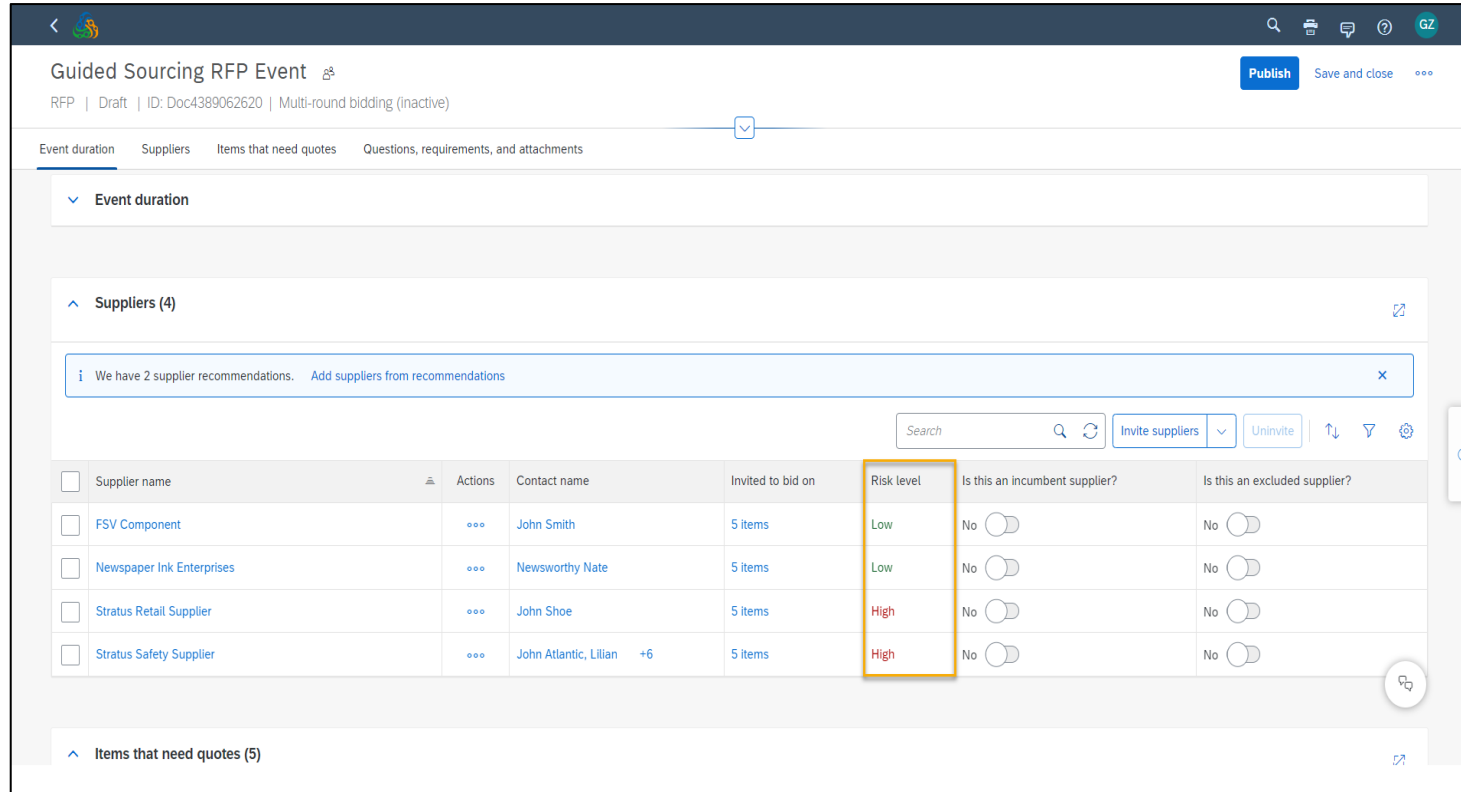
- Analysis of offers based on multiple criteria
- Item coverage analysis
- Graphical and tabular views
- Advanced filtering capabilities
 - Outlier identification
 - Term and supplier selection
 - Primary and alternative bids



Watch this video to learn about Guided Sourcing Advanced Bid Analysis

What's Changed With Guided Sourcing?

Integration with Supplier Risk



The screenshot shows the 'Guided Sourcing RFP Event' interface. The 'Suppliers (4)' section is expanded, displaying a table of suppliers. The 'Risk level' column is highlighted with an orange box, showing 'Low' for the first two suppliers and 'High' for the last two. The 'Is this an incumbent supplier?' and 'Is this an excluded supplier?' columns have toggle switches.

Supplier name	Actions	Contact name	Invited to bid on	Risk level	Is this an incumbent supplier?	Is this an excluded supplier?
FSV Component	...	John Smith	5 items	Low	No <input type="checkbox"/>	No <input type="checkbox"/>
Newspaper Ink Enterprises	...	Newsworthy Nate	5 items	Low	No <input type="checkbox"/>	No <input type="checkbox"/>
Stratus Retail Supplier	...	John Shoe	5 items	High	No <input type="checkbox"/>	No <input type="checkbox"/>
Stratus Safety Supplier	...	John Atlantic, Lilian +6	5 items	High	No <input type="checkbox"/>	No <input type="checkbox"/>

Benefits

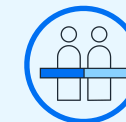
- Real-time supplier risk information embedded within Guided Sourcing events
- Visibility on supplier risk profile break down and risk status categorization

Prerequisites:

- ✓ Your site must be integrated with SAP Ariba Supplier Risk and SAP Ariba Supplier Lifecycle and Performance solutions



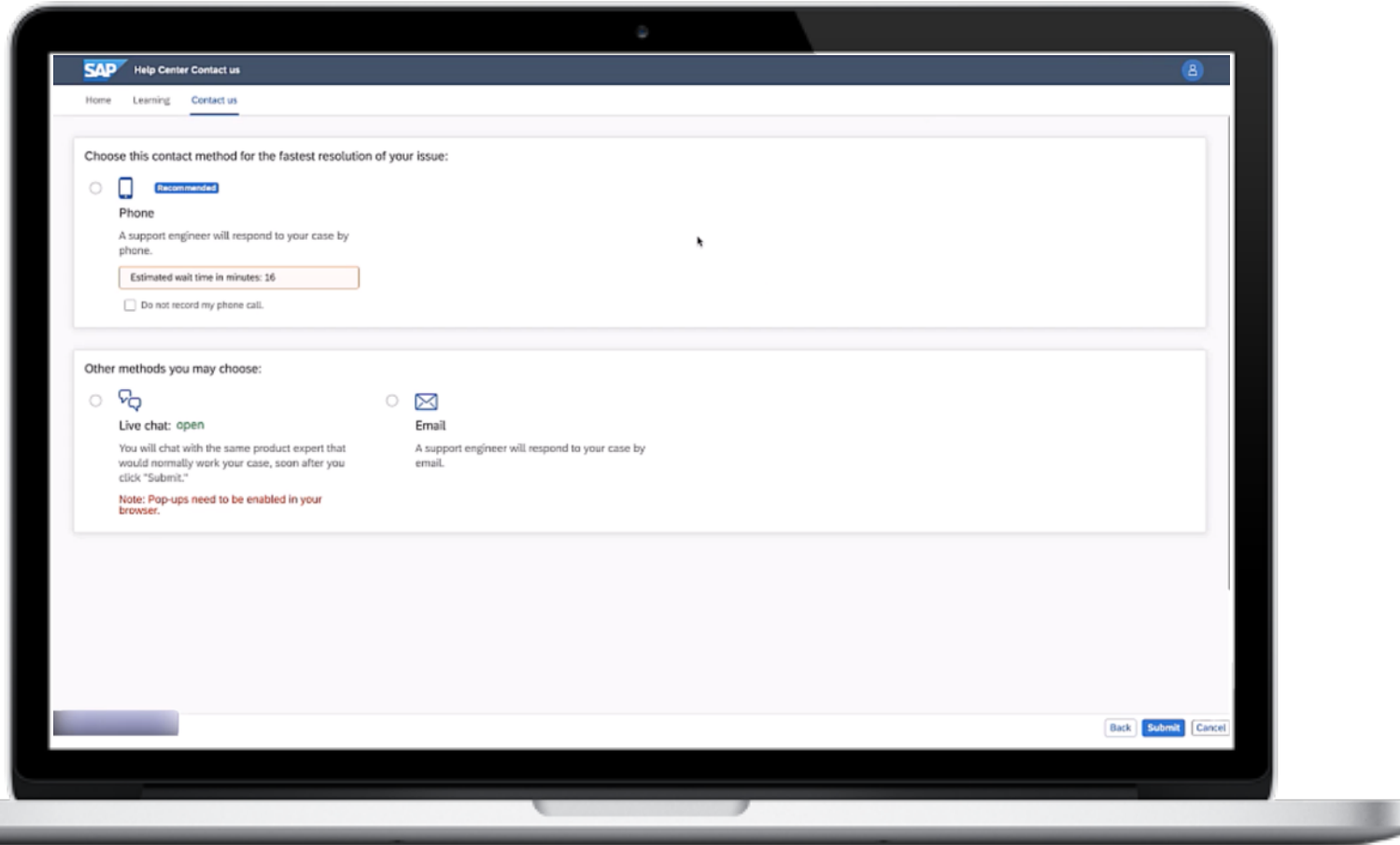
Watch this video to learn about Guided Sourcing integration with Supplier Risk



Guided Buying Tactical Sourcing + Guided Sourcing Integration

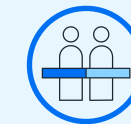
What's Changed With Guided Sourcing?

Event Day Management



Benefits

- SAP Ariba offers a service called “Event Day Management” as part of the Sourcing license. This service applies for non-test competitive RFP and Auctions.
- Event Day Management received major improvements by [SS-40648: Expedited Support Requests on Sourcing Auctions and Competitive RFPs](#)



SAP Ariba Event Day Management (EDM): Advantages and Restrictions



Guided Sourcing Personas & Changes

Team Members & Evaluators

What Has Changed

- New Sourcing Project & Event UI
- The new **For You** dashboard is available
- In system approval UI has changed
 - In-app document preview now available
 - Messaging app has been added to communicate with users
 - SAP Companion to assist with learning
 - Sourcing Evaluation UI has been updated

What Has Not Changed

- Email approvals remain the system
- Email notifications will remain the same
- System generated reports remain the same
- Your sourcing process will remain the same (if template are migrated like for like)



Watch this video to learn about Team Members, Reviewers, Approvers

Guided Sourcing Personas & Changes

Supplier Experience

What Has changed

- Suppliers will experience no impact with the use of Guided Sourcing
- Suppliers require no additional change management or training

What Has Not Changed

- Email notifications will remain the same
- Sourcing event participation (RFX) will remain the same
- Communication with buyers will remain the same



Watch this video to learn about Supplier experience in Guided Sourcing

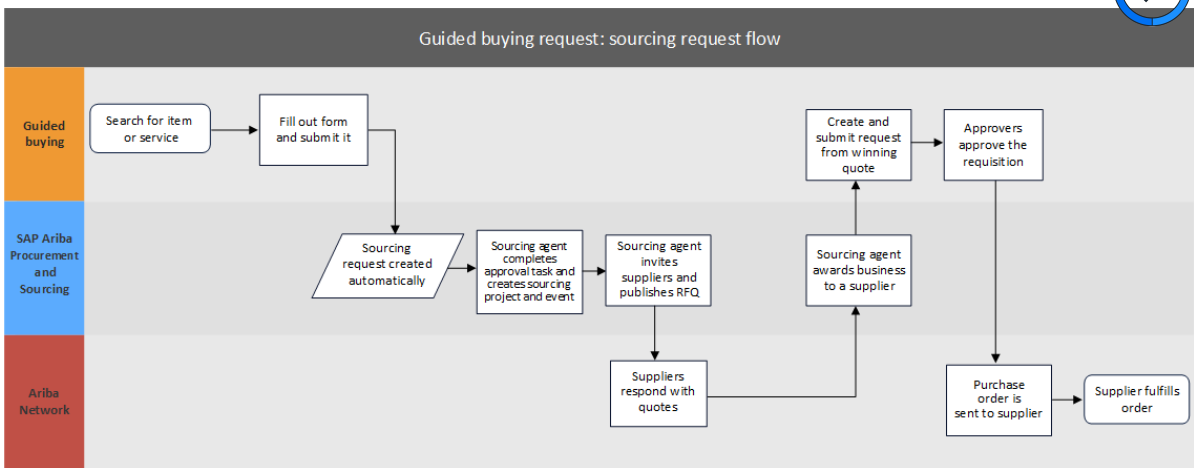
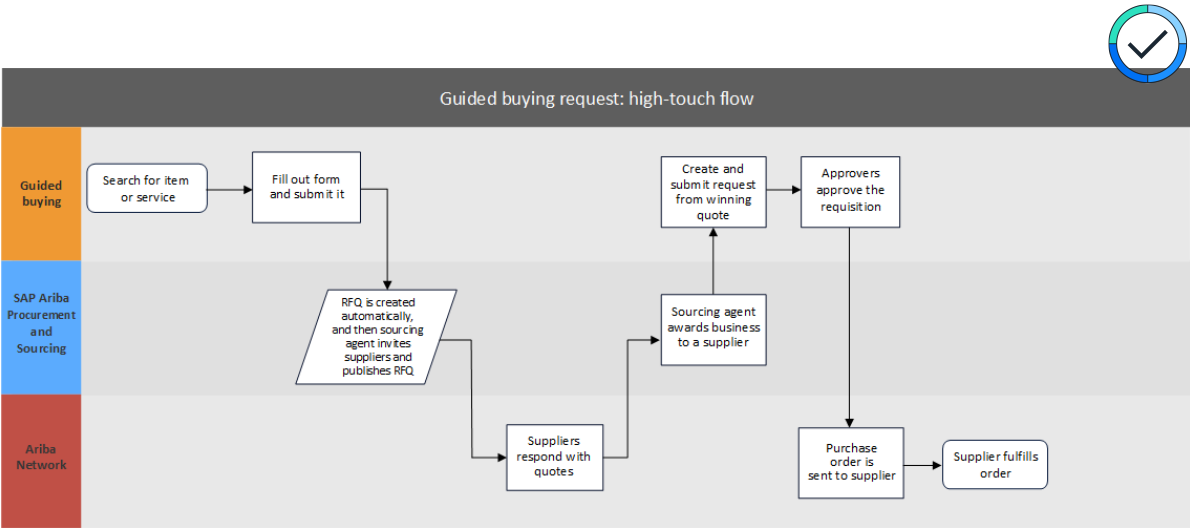
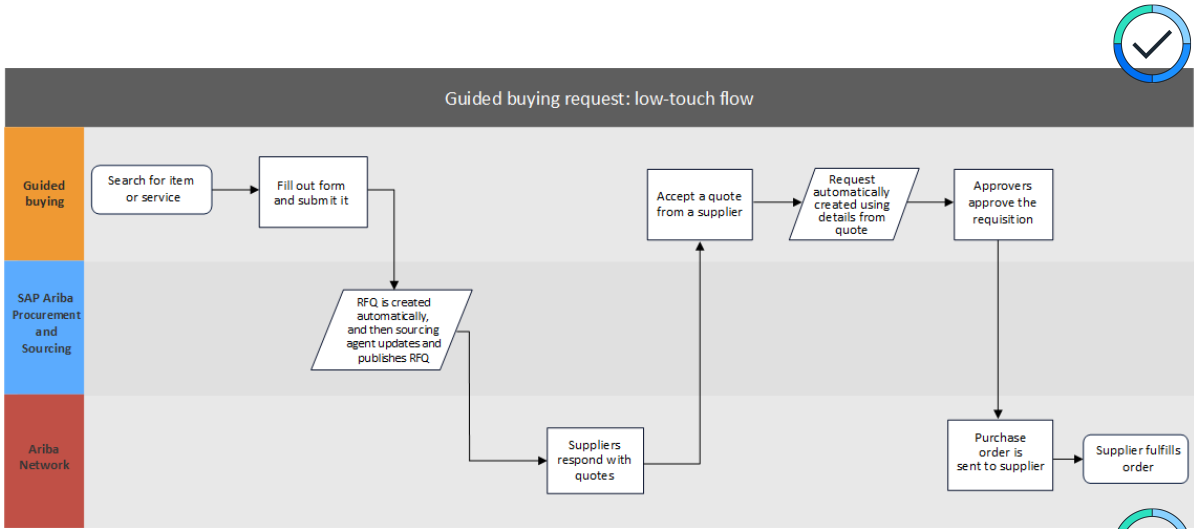


Guided Sourcing Integration



Guided Sourcing Integration

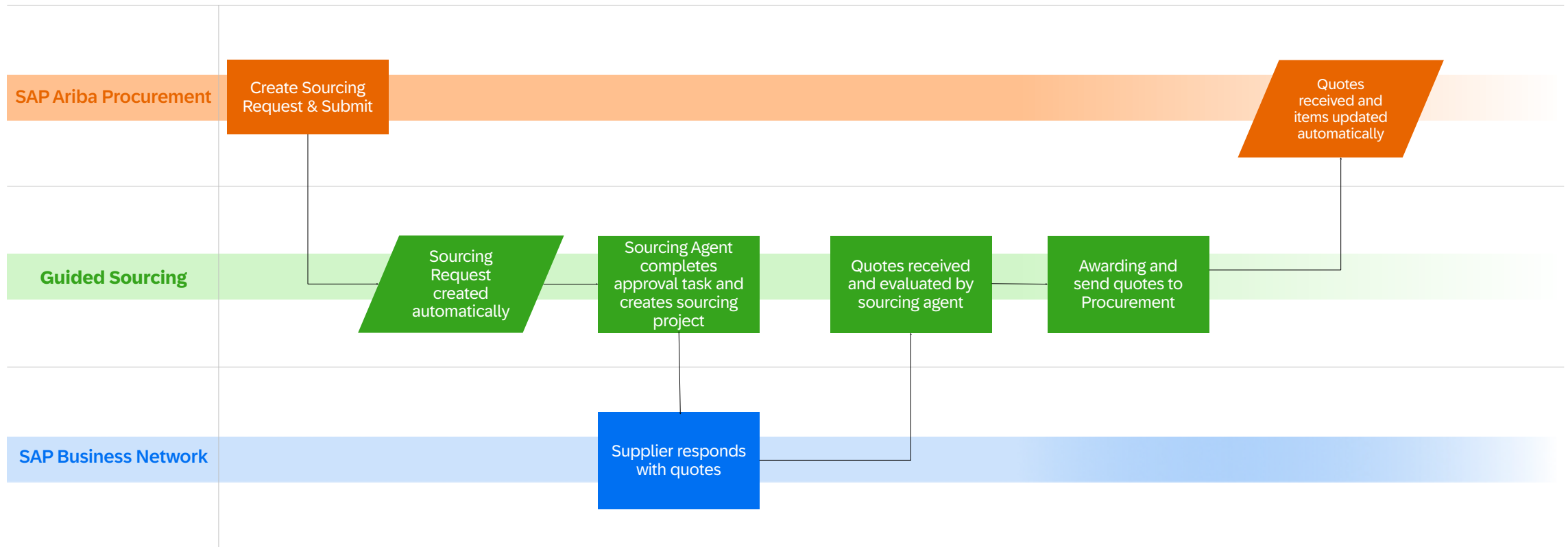
Guided Buying Integration



Guided Buying Tactical Sourcing +
Guided Sourcing Integration

Guided Sourcing Integration

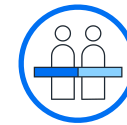
Ariba Buying Integration



Prerequisites for the P2P Integration:



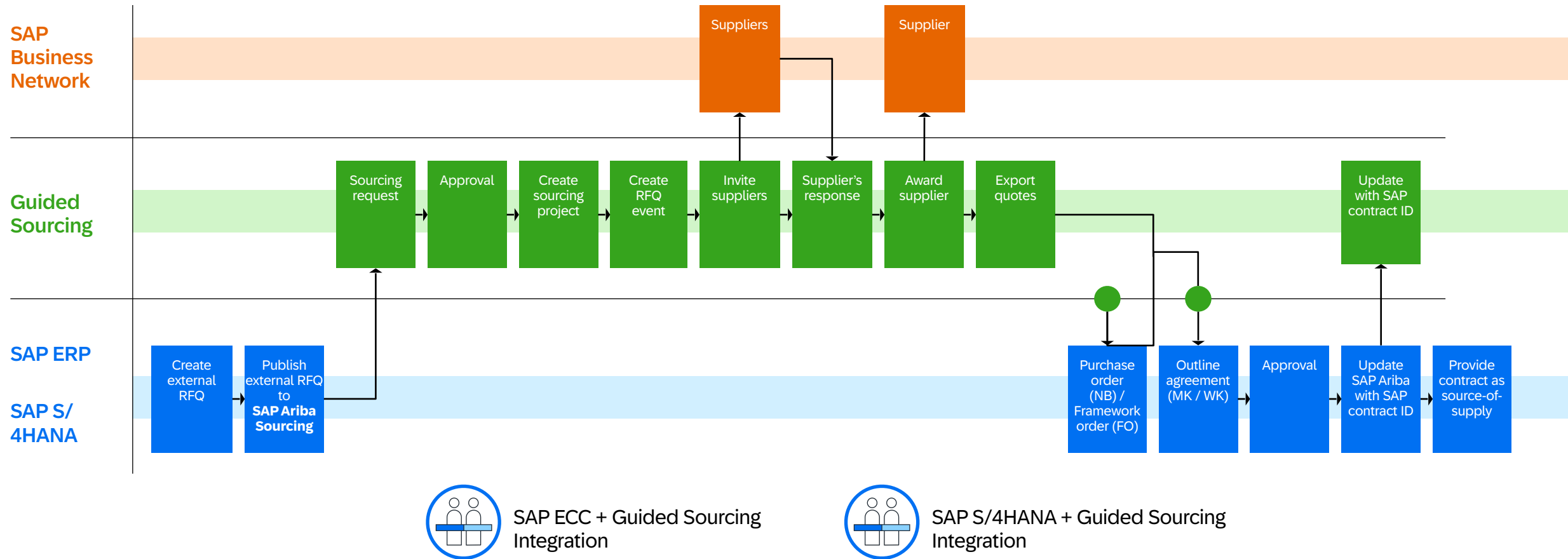
Sourcing PO/OA Integration with External System



Ability to Create Follow-On Documents

Guided Sourcing Integration

SAP ECC/S4H Integration

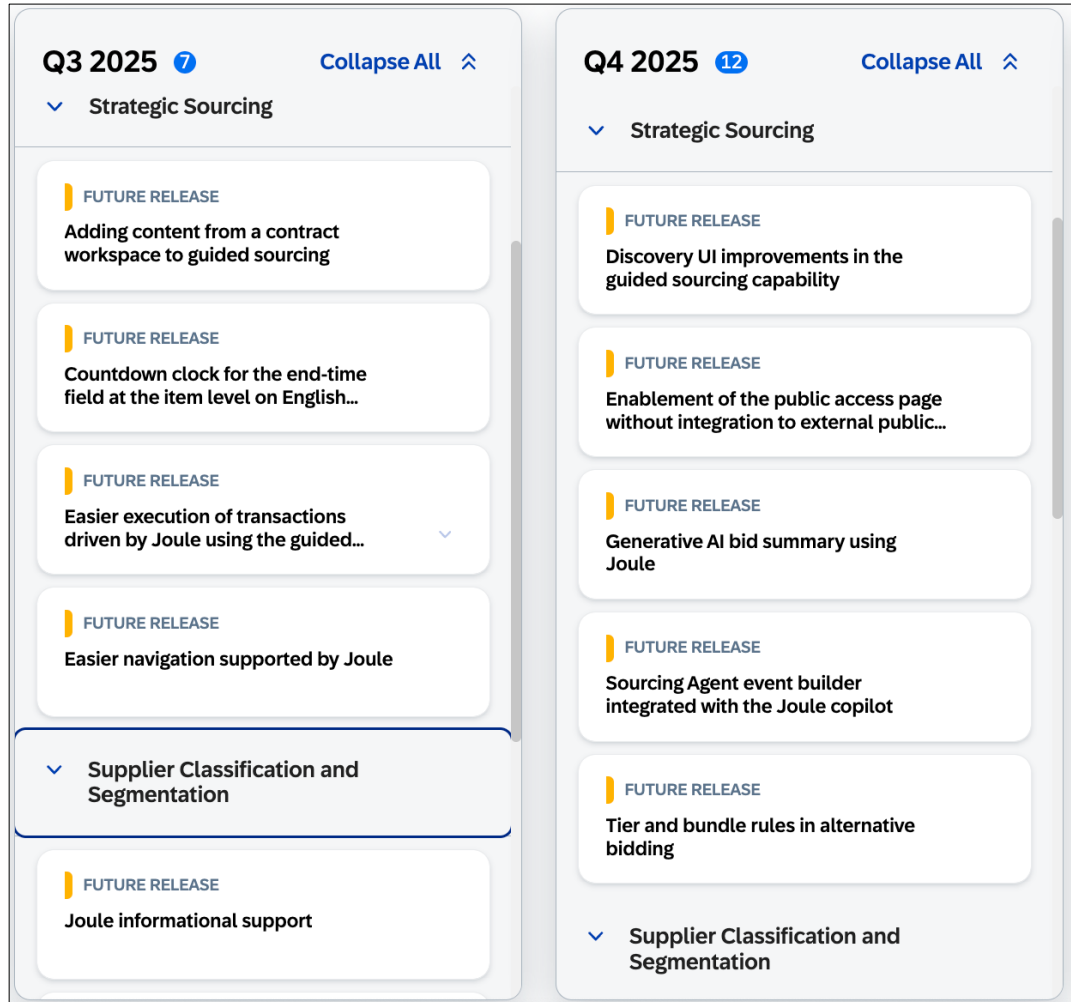


Guided Sourcing - Roadmap



Road Map

The single source of truth for road map information is the



SAP Ariba road map information is accessible through the SAP Road Map Explorer at <https://roadmaps.sap.com>

Filter by

- Processes: Sourcing and Contracts
- Products: SAP Ariba Sourcing, cloud edition

Navigating SAP Road Map Explorer

- Innovations are grouped by release date
- You can click on each innovation to gain insights about it

FAQ's & Video Catalogue



What's Changed With Guided Sourcing?

CPO

[Single page Project & Event Creation UI](#)

[Enhanced Item Management](#)

[Intelligent recommendations on content and suppliers](#)

[Smart Excel Import](#)

[Advanced Bid Analysis](#)

Administrator

[Enhanced Envelope functionality](#)

[Multi-round Events](#)

[Collaboration & Messaging capabilities](#)

['For You' Tab](#)

[Supplier Risk Integration](#)

Sourcing Users & Team

[Enable Now \(SAP Companion\)](#)

[Automatically invite Preferred Suppliers](#)

[Process and Project Insights areas of Full Project](#)

[Category Management Integration](#)

[Event Day Management](#)

FAQ's



Should we switch to Guided Sourcing?

For most customers, Guided Sourcing is a 1:1 replacement for the classic SAP Ariba Sourcing UX as it supports most common functionality. We highly recommended adopting Guided Sourcing now, although both interfaces coexist with the option to use either.



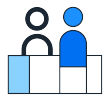
Will projects executed in Guided Sourcing be reportable in the SAP Ariba Spend Analysis solution?

Yes. Reporting on multi-round events is also supported in SAP Ariba Spend Analysis (but not the individual bids).



Do we have to pay a separate fee for Guided Sourcing?

No, Guided Sourcing is available at no additional cost for all licensed SAP Ariba Sourcing customers.



Can we work in both the classic UX and the Guided Sourcing UX?

Yes, as long as you have the correct permissions, you can work in both UXs. You can choose which users access which UX, and they can be in both if needed. Access is controlled by permission.



How can users be given access to Guided Sourcing?

Assign 'Category Buyer' group to give users access to Guided Sourcing



How do I enable Guided Sourcing?

We recommend enabling Guided Sourcing in test before you enable it in production. Guided Sourcing enablement is Self Service at no additional cost; you do not need assistance from SAP to do so.



Can we go back to the Classic Sourcing UI if we want to?

Yes. Access to the new UX is controlled via the user group Category Buyer. You can simply remove users from this group and deactivate the Guided Sourcing templates. Any events in progress will need to be completed using the Guided Sourcing UX.



Will this impact my suppliers?

Suppliers will view and respond to events in the same way. This is only a UX change on the buyer side. However, if you use the new functionality in Guided Sourcing, such as multi-round bidding, you'll want to make sure suppliers are aware that you are using it and to expect new rounds.



Will we need to do extensive training to enable our users?

Guided Sourcing is an intuitive, user-friendly UX which increases adoption and makes the creation of events easier and quicker. Extensive training is not necessary. Also, [WalkMe in Guided Sourcing](#) and [SAP Enable Now for Guided Sourcing](#) helps the user quickly get help if they need it. These are SAP's in-app guidance and automation tool.



I have more questions. Where can I go?

See the full list of available FAQs at [FAQ: Guided sourcing capability for SAP Ariba Sourcing](#)

Additional Adoption Support

Implementation Service

Business Outcomes

- Boost user adoption and satisfaction through improved usability
- Increase negotiated savings potential and process compliance
- Execute faster with up to a 50% improvement in time to create a sourcing event
- Build internal self-sufficiency to manage systems

Business Relevance

- Improvements in organizational agility by introducing sourcing intelligence to streamline and speed the creation, monitoring, and awarding of request-for information and request-for-proposal sourcing events
- Ideal for customers that have deployed the SAP® Ariba® Sourcing solution and want to:
 - Enable guided sourcing to simplify the sourcing process & improve adoption
 - Improve negotiated savings to meet corporate sourcing objectives

Deliverables and Time Frames

Guided sourcing experts from SAP collaborate on key aspects of your implementation:

- Review and demo guided sourcing features and capabilities
- Assess and recommend customer sourcing templates for conversion to guided sourcing formats
- Convert standard sourcing templates to guided sourcing (up to two full projects and five events)

This service is fixed fee and delivered over two to four weeks. Customers can add one year of guided sourcing adoption support.

Related Products and Services

- **Services:** [50159479](#): Implementation service for guided sourcing capability for SAP Ariba Sourcing
- **Products:** SAP Ariba Sourcing
- **Learn More:** Reach out to your SAP account executive or services account executive

Additional Adoption Support

Education & Support

SAP Ariba is invested in our customer's success. To support you in your transformation journeys, we have created a number of value accelerators. All playbooks are available on [Connect](#).

Check out these Sourcing-related Value Accelerator playbooks:

[Sourcing Maturity Value Accelerator](#)

[Auctions Value Accelerator](#)

[Measuring Value - Value Accelerator](#)

[Guided Sourcing Full Projects Value Accelerator E-Learning](#)

To request more information about the adoption of SAP Ariba solutions, contact SAP_IAC@sap.com

Training Resources

Guided Sourcing Buyer Playbook: [Buyer Playbook](#)

Guided Sourcing Enablement Lab (Full Projects): [Adopting Guided Sourcing for Strategic Projects](#)

Guided Sourcing Enablement Lab (Sourcing Events): [Enabling and Adopting Guided Sourcing](#)

Auction Overview: [Auction Types and Best Practices](#)