Creating a Sourcing Request in LESA

This document describes the procedure for creating a Sourcing Request.

1. Log into LESA (<u>http://louisiana.sourcing.ariba.com</u>). On the left side of the screen, click "Sourcing Request" under Common Actions.

HOME SOUR	CING CONTR	RACTS SUPPLIERS
Sourcing Project 🗸	Search using Title,	, ID, or any other term
Common Actions Create Sourcing Request Contract Request (Proc	v	Event Status
Manage Sourcing Library Supplier Knowledge My Tasks		0 Events
		News

2. On the Create Sourcing Request screen, required fields are marked by a red asterisk (*). Some fields include Help Tips, which may be accessed by clicking on the circled "i" at the end of the field.

Create Sourcing Requ	est	
To create a Sourcing Request, spe	ecify the fields below. Templates used for constructing your Sourcing Request	appear in the
Name	Untitled Sourcing Request	<u>(</u>)
Description:		0
		J
Copy from Project:	(no value) V	
Test Project *	Ves No (i)	

3. Enter the name of the project in the Name field and a brief description of the project in the Description field.

Create Sourcing Request				
To create a Sourci	ng Request, spe	cify the fields below. Templates used for constructing your Sourcing Request a	appea	r in
	Name: *	RFP for Consulting Services] ()	
	Description:	A consultant is needed to assist our agency with modernizing our work processes.	i	
Сору	from Project:	(no value) V]

- 4. The next field, Copy from Project, should be ignored. This field copies information from another Sourcing Request in LESA, including all fields, such as submittal date. Since the dates will change from one Sourcing Request to another, the field must be left blank.
- 5. If you are training or practicing how to create and submit a Sourcing Request, select Yes for Test Project. Otherwise select No.

Create Sourcing Request			
To create a Sourcing Request, spe	cify the fields below. Templates used for constructing your Sourcing Request a	ppear i	
Name: *	RFP for Consulting Services	(i)	
Description:	A consultant is needed to assist our agency with modernizing our work processes.	i	
Copy from Project:	(no value) V		
Test Project: *	Ves No i		

6. For Statewide/Region(s)/Parish(es), click the down arrow on the field. If you have previously created a Sourcing Request, the system will present a list of previously selected items that can be chosen by clicking on them. If this is your first Sourcing Request, or the item needed is not included in the previously selected items list, choose "Search more". Select the location(s) where the work will be performed or the goods will be delivered. Individual parishes, regions, or statewide may be chosen by selecting the box to the left of the appropriate item. Click on the arrow next to the region to expand the list to include the individual parishes within that region. Multiple selections may be made.

NOTE: The regions correspond to the GOHSEP and Department of Military Affairs regions, which may differ from a region map regularly used by your agency.

Create Sourcing Request			
To create a Sourcing Request, spe	cify the fields below. Templates used for constructing your Sourcing Request appea		
Name: *	RFP for Consulting Services		
Description:	A consultant is needed to assist our agency with modernizing our work (i) processes.		
Copy from Project:	(no value)		
Test Project: *	Yes No i		
Base Language:	English 🗸		
Statewide/Region(s)/Parish(es):	(no value)		
Agency: *	All Statewide		
Estimated Value	R2 Region 2		
Estimated Value:	Q Search more		

Add to Curre	ently Selected		Currently Selected
Region ~		Search	Description † Region
Descrip	tion 1	Region	No items
▼ s	tatewide	All	<
	Region 1	R1	
	Jefferson	JEF	
\checkmark	Orleans	ORL	
	Plaquemines	PLA	
	St. Bernard	STB	
 Image: A set of the set of the	Region 2	R2	

7. Choose the appropriate Agency(ies) by clicking the down arrow on the field. If you have previously created a Sourcing Request, the system will present a list of previously selected items that can be chosen by clicking on them. If this is your first Sourcing Request, or the item needed is not included in the previously selected items list, choose "Search more". Agencies may be selected by selecting the box next to the agency name. Click the arrow next to the Department to show the agencies within that Department. Multiple selections may be made. NOTE: The agency level must be chosen, not the department.

Create Sourcing Request				
To create a Sourcing Request, spe	ecify the fields below. Templates used for constructing your Sourcing Requ	est appea		
Name: *	RFP for Consulting Services			
Description:	A consultant is needed to assist our agency with modernizing our work processes.	i		
Copy from Project:	(no value)			
Test Project: * Yes No (i)				
Base Language:	English 🗸			
Statewide/Region(s)/Parish(es):	R2 Region 2 V Add more			
	ORL Orleans ×			
Agency: *	(no value)			
Estimated Value: *	107 Division of Administration			
Project Reason:	820 Office of State Procurement DAF Department of Agriculture and Forestry			
Predecessor Project:	Q Search more			

Choose Values for Agency					
Add to Currently Selected			Currently Selected		
Function V	Search		Function 1	ID	
Function 1	ID		No items		
▼ All	All	~	<		>
Community and Technical College System	LCTCS				
CPRA	CPRA				
Department of Agriculture and Forestry	DAF				
Department of Corrections	DOC				
Adult Probation and Parole	415				
Allen Correctional Center	408				
Avoyelles Correctional Center	405				
B.B. Sixty Rayburn Correctional Center	416				

8. In the Estimated Value field, enter the project budget or estimated value of the resulting contract(s). For multiple awards, it is the combined value of all expected contracts.

If the contract will result in a no-cost contract for the State, the agency should enter the estimated value of the contract for the total contract term (e.g. the value of the contract to the Contractor).

Create Sourcing Request				
To create a Sourcing Request, specify the fields below. Templates used for constructing your Sourcing Request appea				
Name: *	RFP for Consulting Services	i		
Description:	A consultant is needed to assist our agency with modernizing our work processes.	i		
Copy from Project:	(no value)			
Test Project: *	Yes No (i			
Base Language:	English 🗸			
Statewide/Region(s)/Parish(es):	R2 Region 2 V Add more			
	ORL Orleans ×			
Agency: *	405 Avoyelles Correctional Center V Add more			
	408 Allen Correctional Center ×			
Estimated Value: *	\$500,000 USD (j)			

9. In the Project Reason field, select one of the choices by clicking the down arrow.

Create Sourcing Requ	est		
To create a Sourcing Request, spe	cify the fields below. Templates used for construct	ing your Sourcing Request appea	
Name: *	RFP for Consulting Services		
Description:	A consultant is needed to assist our agency with processes.	i)	
Copy from Project:	(no value) 🗸		
Test Project: *	Ves 🔵 No 🛈		
Base Language:	English 🗸		
Statewide/Region(s)/Parish(es):	R2 Region 2 V	Add more	
	ORL Orleans ×		
Agency: *	405 Avoyelles Correctional Center 🗸 🗸	Add more	
	408 Allen Correctional Center \times		
Estimated Value: *	\$500,000 USD (j		
Project Reason:	No Choice 🗸 🕡		
Predecessor Project:	No Choice 🗸 🔾		
Recurring RFP: *	Contract Expiring		
Previous RFP Transmittal: *	New Component/Reengineer		
Previous Protest? *	Legislative Mandate		
	Federal Mandate		
	Price Improvement		

10. The Predecessor Project field does not need to be completed.

11. In the Recurring RFP field, select Yes if this project is a recurring RFP. Select No if the project is for a new service.

Create Sourcing Request					
To create a Sourcing Request, spe	To create a Sourcing Request, specify the fields below. Templates used for constructing your Sourcing Request appear				
Name: *	RFP for Consulting Services	i			
Description:	A consultant is needed to assist our agency with modernizing our work processes.	i			
Copy from Project:	(no value) V				
Test Project: *	Ves No (i				
Base Language:	English 🗸				
Statewide/Region(s)/Parish(es):	R2 Region 2 V Add more				
	ORL Orleans ×				
Agency: *	405 Avoyelles Correctional Center V Add more				
	408 Allen Correctional Center ×				
Estimated Value: *	\$500,000 USD (i)				
Project Reason:	No Choice 🗸 i				
Predecessor Project:	(no value) v				
Recurring RFP: *	Ves No (j				

a. If Recurring RFP is Yes, two (2) additional fields will appear: Previous RFP Transmittal and Previous Protest.

Create Sourcing Requ	est		
To create a Sourcing Request, spe	cify the fields below. Templates used for construct	ing your Sourcing Request appear in t	
Name: *	RFP for Consulting Services (i)		
Description:	A consultant is needed to assist our agency with processes.	modernizing our work (i)	
Copy from Project:	(no value) V		
Test Project: *	Ves 🔵 No (i		
Base Language:	English 🗸		
Statewide/Region(s)/Parish(es):	R2 Region 2 V	Add more	
	ORL Orleans ×		
Agency: *	405 Avoyelles Correctional Center 🗸 🗸	Add more	
	408 Allen Correctional Center \times		
Estimated Value: *	\$500,000 USD (i)		
Project Reason:	No Choice 🗸 🛈		
Predecessor Project:	(no value) v i		
Recurring RFP: *	● Yes ◯ No (i)		
Previous RFP Transmittal: *	()		
Previous Protest? *	Ves No i		

- b. In Previous RFP Transmittal, enter the Sourcing Request ID of the previous RFP that was processed in LESA, the ProAct Transmittal number of the previous RFP that was processed in ProAct, or the Shopping Cart number of the previous RFP that was processed in DocTracking.
- c. For Previous Protest, select Yes if the immediately preceding RFP was protested.

Create Sourcing Requ	est	
To create a Sourcing Request, spe	cify the fields below. Templates used for constr	ucting your Sourcing Request appear
Name: *	RFP for Consulting Services	
Description:	A consultant is needed to assist our agency wind processes.	ith modernizing our work (i)
Copy from Project:	(no value) V	
Test Project: *	Ves No i	
Base Language:	English 🗸	
Statewide/Region(s)/Parish(es):	R2 Region 2	Add more
	ORL Orleans >	<
Agency: *	405 Avoyelles Correctional Center	Add more
	408 Allen Correctional Center	< Comparison of the second sec
Estimated Value: *	\$500,000 USD (j	
Project Reason:	No Choice 🗸 i	
Predecessor Project:	(no value) v	D
Recurring RFP: *	💽 Yes 🔵 No 🕡	
Previous RFP Transmittal: *	3000015842 (i	
Previous Protest? *	Ves 💽 No 🥡	

12. In the Commodity field, select the appropriate commodity code(s) by clicking the down arrow on the field. If you have previously created a Sourcing Request, the system will present a list of previously selected items that can be chosen by clicking on them. If this is your first Sourcing Request, or the item needed is not included in the previously selected items list, choose "Search more". Select the box next to the appropriate commodity code(s). You may search for the appropriate commodity code(s) by Name or by ID. Multiple selections may be made. Note: Commodity code(s) chosen must have six (6) or more digits. This is at least two (2) levels down on the hierarchy.

Create Sourcing Requ	est				Create Cancel
o create a Sourcing Request, sp	edfy the fields belaw. Templates used for constru	cting your Sourcing Reque	st appear in the sectio	n at the bottom of the page	and available Templates More
Name: *	RFP for Consulting Services		0		
Description:	A consultant is neecled to assist our agency with processes.	modernizing our work	©		
Copy from Project:	(no value) V		J		
Test Project: *	🗌 Yes 🔘 No 🕕				
Base Language:	English 🗸		Ow	ner: Austin Bachman	~] 0
tatewide/Region(s)/Parish(es):	R2 Rogion 2 🗸 🗸	Add more	Curre	ncy: US Dollar	\sim
	ORL Orleans $\qquad \qquad \times$		Commo	dity: * (no value)	~
Agency: *	405 Avoyelles Correctional Center \sim	Add more		DIESEL FUEL 151019	05
	408 Allen Correctional Center $\qquad \times$			GASOLINE OR PETRO	DL 15101506
Estimated Value: *	\$500,000 USD ()			ELEVATOR MAINTEN	ANCE SERVICES, 72101506
Project Reason:	No Choice V			Q. Search more	TMENT 8412

Choose Values for Commodity	
Add to Currently Selected	
Name V consult Search	ID
BUSINESS AND CORPORATE MANAGEMENT CONSULTATION SERVICES	801015
FASHION CONSULTANTS	911019
Make up consultation	911016
Oilfield consultancy services	711616

- 13. At the bottom of the create screen, answer the questions posed.
 - a. For the first question, answer Yes if your agency legal section needs to review the Sourcing Request prior to submittal to OSP. This will insert your legal section in the approval workflow.
 - b. For the second question, answer Yes if your agency budget section needs to review the Sourcing Request prior to submittal to OSP. This will insert your budget section in the approval workflow.

Sele Select	ct a template the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.
\bigcirc	OSP Sourcing Request
	Use this template to create a Sourcing Request.
	Does your legal section need to review the documents prior to submittal to OSP? No v
	Does your budget section need to review the request prior to submittal to OSP? \square No \checkmark

14. Click the blue Create button at the top or bottom of the screen to create the Sourcing Request.

Selec	t a template the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.	
۲	OSP Sourcing Request	
	Use this template to create a Sourcing Request.	
	Does your legal section need to review the documents prior to submittal to OSP? No v	
	Does your budget section need to review the request prior to submittal to OSP? No v	
	Create Cancel	٦

15. Now that you have created the Sourcing Request, the activities to be completed in order to submit the Sourcing Request to OSP may be found below.

Submitting a Sourcing Request

Starting with step 16, this process describes the procedure for adding the necessary documents to a Sourcing Request and submitting the Sourcing Request to OSP.

- 16. Log into LESA and access your already created Sourcing Request.
- 17. In the Sourcing Request, click on the "Tasks" tab. This displays the tasks that must be completed in order to submit the Sourcing Request to OSP.

Overview Documents Tasks Team Message Board Event Messages History Overview Documents Tasks Team Message Board Event Messages History		Related Knowledge	RFP for Consulting Ser Sourcing Request	rvices		
Overview Actions V Proc ID: \$R120335798 ① ID: Version: Original ID: Project Status: Gray ID: Start Date: 11/20/2020 ① ID: Due Date: 11/20/2020 ① ID: Estimated Value: \$500,000 USD ② ID: Process Status: ③ ID:	Overview Actions > Process ID: SR120335798 () () Version: Original () Project Status: Gray Ouick Due Date: 11/20/2020 () () () Owner: Austin Bachman () () () Owner: Austin Bachman () () () Estimated Value: \$\$500,000 USD () () () Process Status: () () () Commodity: BUSINESS AND CORPORATE MA View more Annore	 Expand Projects Exnowledge Areas Search Knowledge 	Overview Documents	Tasks Team Message Board Event Me	ssages History	
ID: SR120335798 () (C Version: Original Project Status: Gray Start Date: 11/20/2020 () Quict Due Date: 11/20/2020 () (C Version: Austin Bachman () Estimated Value: S500,000 USD () Process Status: ()	ID: SR120335798 () (C) Version: Original Project Status: Gray Start Date: 11/20/2020 () (Ouick Due Date: 11/20/2020 () Owner: Austin Bachman () Estimated Value: \$500,000 USD () Process Status: () Commodity: BUSINESS AND CORPORATE MA View more Annoce		Overview		Actions 🗸	Proce
Version: Original Project Status: Gray Start Date: 11/20/2020 ① Due Date: 11/20/2020 ① Owner: Austin Bachman ③ Estimated Value: \$500,000 USD ④ Process Status: ④	Version: Original Project Status: Gray Quick Start Date: 11/20/2020 ① Quick Due Date: 11/20/2020 ① Commodily: Owner: Austin Bachman ③ Commodily: Estimated Value: \$500,000 USD ③ Process Status: ③ Commodily: BUSINESS AND CORPORATE MA View more		ID;	SR120335798 ①		C
Project Status: Gray Start Date: 11/20/2020 ① Due Date: 11/20/2020 ① Owner: Austin flachman ③ Estimated Value: \$500,000 USD ③ Process Status: ④	Project Status: Gray Quick Start Date: 11/20/2020 0 Due Date: 11/20/2020 0 Owner: Austin Bachman 6 Estimated Value: \$\$500,000 USD 0 Process Status: 0 6 Commodity: BUSINESS AND CORPORATE MA View more Annor		Version:	Original		
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Owner: Austin Bachman () Estimated Value: \$500,000 USD () Process Status: ()	Owner: Austin Bachman () Estimated Value: \$00,000 USD () Process Status: () Commodity: BUSINESS AND CORPORATE MA View more Annot		Start Date: Due Date:	11/20/2020		
Estimated Value: \$500,000 USD () Process Status: ()	Estimated Value: \$500,000 USD () Process Status: () Commodity: BUSINESS AND CORPORATE MA View more Annou		Owner:	Austin Bachman ()		C:
Process Status: (i)	Process Status: () Commodity: BUSINESS AND CORPORATE MA View more Annou		Estimated Value:	\$500,000 USD ③		
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Commodity: BUSINESS AND CORPORATE MA View more Anno			Commodity:	BUSINESS AND CORPORATE MA View more		Annoi

18. Click on the "Add Team Members to Project" task and choose "View Task Details".

Related Knowledge	RFP for Consu Sourcing Request	lting Services		ID SI Tasks: In Next Milestone: Si	R120335798 complete Task abmit Sourcing	s: 2 Request to C
 Expand Projects All Knowledge Areas Search Knowledge 	Overview	Documents Tasks Te	am Message Board	Event Mess	ages Hé	story
	Show: (Any Status)	V Required/Optio	nal 🧹 (Any Owner)		~]
	RFP for Consulting	Services			Actions	• •
	Name		Document	Owner	Status	Due Date
	Notification	for New Sourcing Requests $ arsia $	RFP for Consulting Services ∨	Project Owner	Scheduled	11/20/2020
	G Add Team	Members to Project * 🗸		Austin Bachman	Not Started	
	C Action		RFP Documents V	Project Owner	Not Started	11/20/2020
	(S) View	Task Details 🛛 P * 🗸	RFP for Consulting Services ✓	Project Owner	Not Started	
	Edit	Task			#Ind	icates require
	Mark	Started				
	Mark	Complete				
	Asso	ciate Document				

19. Each task contains a description of the action to be taken in that task. Read the description and then click the "Mark Started" button.

0	🖶 🔤 💿 🔒
To Do Task	Exit
Tasks are assigned work to be finished by a given date. If you have not yet started the task, click Mark Started to indica REP for Consulting Services / Add Team Members to Project	ate that you are working on it. If this task is finished, you Mon
TSK120509968 Add Team Members to Project	
Click on the "Team" tab. On the right side of the screen, click the Actions button and select Edit.	
Add team members by clicking the down arrow under Members and choosing "Search more". For Agency Approver, s approve the procurement. For Agency Budget, select the fiscal approver for your agency. For Agency Legal, select the Evaluation Committee, add members of the Evaluation Committee, if known. For Observers, add any agency personr not fall into one of the other Groups. If you need to add someone to the Team who does not have an Ariba account,	select the person at your agency who has the authority to he attorney assisting you with the procurement. For nel that may need to be involved in the procurement, but do contact OSP.
Mark Started Mark Complete	

20. Returning to the Tasks tab, you will see the icon has changed for the "Add Team Members to Project" task and the status now shows "In Progress".

< 0			Q	† 🛡	0 AB
Related Knowledge	RFP for Consulting Services		ID S Tasks: In Next Milestone: S	R120335798 complete Task	ks: 3 2 Request to OSP
Expand Projects II Knowledge Areas earch Knowledge	Overview Documents Tasks Tea	m Message Board	d Event Mess	uages H	istory
	Show: (Any Status) V Required/Option RFP for Consulting Services	al 🗸 (Any Owner)		Actions	
	Name	Document	Owner	Status	Due Date
	🗋 Notification for New Sourcing Requests 🗸	RFP for Consulting Services V	Project Owner	Scheduled	11/20/2020
	📋 Add Team Members to Project * 🗸		Austin Bachman	In Progress	
	③ Complete RFP Documents* ✓	RFP Documents V	Project Owner	Not Started	11/20/2020
	ⓒ Submit Sourcing Request to OSP [●] ∨	RFP for Consulting Services V	Project Owner	Not Started	٩
				82	

21. To complete the "Add Team Members to Project" task, click on the "Team" tab. On the right side of the screen, click the Actions button and select Edit.

Related Knowledge	RFP for Consulting Services	ID SR120335798 Tasks: Incomplete Tasks: 2 Next Milestone: Submit Sourcing Request to OSP
 Expand Projects All Knowledge Areas Search Knowledge 	Overview Documents Tasks Te	am Message Board Event Messages History
	Team Members	Actions 👻
	Group †	Members Team Members
	Agency Approver	(no value)
	Agency Budget	(no value)
	Agency Legal	(no value)
	Evaluation Committee	(no value)
	Observers	(no value)
	OSP	Manager

- 22. Add team members by clicking the down arrow under Members and choosing "Search more".
 - a. For Agency Approver, select the person at your agency who has the authority to approve the procurement.
 - b. If your internal agency policy requires agency budget to approve the project prior to sending to OSP, select the fiscal approver for your agency in the Agency Budget group.
 - c. If your internal agency policy requires agency legal to approve the Scope of Work prior to sending to OSP, select the attorney assisting you with the procurement in the Agency Legal group.
 - d. For Observers, add any agency personnel that may need to be involved in the procurement, but do not fall into one of the other Groups.
 - e. If you need to add someone to the Team who does not have an LESA account, contact LESA@la.gov.

Group 1 Members Agency Approver ✓ Agency Budget Shannon Arceneaux Agency Legal Shannon Arceneaux Agency Legal Calvin Mayeux Evaluation Committee Glenn Frazier Observers Q Search more OSP ✓	Group 1 Members Agency Approver ✓ Agency Budget Shannon Arceneaux Agency Legal Calvin Mayeux
Group 1 Members Agency Approver ✓ Agency Budget Shannon Arceneaux Agency Legal Shannon Arceneaux Agency Legal Calvin Mayeux Evaluation Committee Glenn Frazier Observers Q. Search more OSP ✓ Project Owner Austin Bachman	Group 1 Members Agency Approver ✓ Agency Budget Shannon Arceneaux Agency Legal Calvin Mayeux
Agency Approver Agency Budget Agency Legal Agency Legal Evaluation Committee Observers Q Search more OSP Project Owner Agency Approver	Agency Approver ✓ Agency Budget Shannon Arceneaux Agency Legal Calvin Mayeux
Agency Budget Shannon Arceneaux Agency Legal Austin Bachman Calvin Mayeux Glenn Frazier Observers Q Search more OSP Search more Project Owner Austin Bachman	Agency Budget Shannon Arceneaux Agency Legal Calvin Mayeux
Agency Legal Austin Bachman Evaluation Committee Glenn Frazier Observers Jessica Barnes OSP Search more Project Owner Austin Bachman	Agency Legal Calvin Mayeux
Evaluation Committee Glenn Frazier Observers Jessica Barnes OSP Search more Project Owner Austin Bachman	
Observers Jessica Barnes OSP Q Search more Project Owner Austin Bachman	Evaluation Committee Glenn Frazier
OSP OSP Austin Bachman Add more Add more	Observers Jessica Barnes
Project Owner Austin Bachman V Add more	OSP Q Search more
	Project Owner Austin Bachman V Add more

the Team for this Sourcing Request. To add a new Group to this S	ourcing Request, click Add Grou		
		л р .	
n Members			
Choose Values for Members			
Add to Currently Selected		Currently Selected	
Name 🗸 felicia Search		Name † ID Type Phone I	Email Address
Name † ID Type Pho	ne Email Address	No items	
Felicia felicia.sonnier@la.gov Enterprise User 342- 802/	felicia.sonnier@la.gov	<	>
<	>		-
			Done

23. Once all Team Members have been added, return to the Tasks tab. Click on the "Add Team Members to Project" task and select "Mark Complete".

					Q	†	1 (1) (1) (1) (1) (1) (1) (1) (1) (1) (1
elated Knowledge	RFP	for Consulting Servio	ces		ID S Tasks: In Next Milestone: S	R120335798 complete Task	s: 3 Request to OSP
Expand Projects I Knowledge Areas rarch Knowledge	0	verview Documents	Tasks	n Message Boan	d Event Mess	ages Hi	istory
	Show:	(Any Status) 🗸 🗸	Required/Optiona	l 🗸 (Any Owner)		\sim]
	RFP fo	r Consulting Services				Actions	•
	Name			Document	Owner	Status	Due Date
	(Notification for New Source	ng Requests 🗸	RFP for Consulting Services V	Project Owner	Scheduled	11/20/2020
	l.	dd Team Members to Pro	ject * 🗸		Austin Bachman	In Progress	
	(C Action	1	RFP Documents V	Project Owner	Not Started	11/20/2020
	(S View Task Details	5P* 🗸	RFP for Consulting Services ✓	Project Owner	Not Started	•
		Edit Task Mark Started				* Ind	licates required tas
		Mark Complete Associate Document					

24. Next click on the "Complete RFP Documents" task and select View Task Details.

Related Knowledge	RFP for Consulting Services		ID SR120335798 Tasks: Incomplete Tasks: 3			
Expand Projects			Next Mitestone: 54	ubmit Sourcing	Request to USP	
l Knowledge Areas earch Knowledge	Overview Documents Tasks Te	am Message Board	d Event Mess	iages Hi	story	
	Show: (Any Status)	onal 🧹 (Any Owner)		×)	
	RFP for Consulting Services			Actions	• m	
	Name	Document	Owner	Status	Due Date	
	\square Notification for New Sourcing Requests \checkmark	RFP for Consulting Services V	Project Owner	Scheduled	11/20/2020	
	🖾 Add Team Members to Project * 🗸		Austin Bachman	In Progress		
	ⓒ Complete RFP Documents* ✓	RFP Documents V	Project Owner	Not Started	11/20/2020	
		RFP for Consulting Services ∨	Project Owner	Not Started	٩	
	View Task Details			*Ind	icates required task	
	Edit Task					
	Open Folder					
	Mark Started					
	Mark Complete					

25. Read the task description. The referenced document templates can be downloaded within the task or from the RFP Documents folder on the Documents tab. Click Cancel to return to the Tasks tab.

Document Task	Cancel
Make the necessary changes to this task, and click OK to save the changes. You can c	hange the Due Date , change the chronological display order of this task in the project by More
TSK120509917 Complete RFP Documents	Not Started
 Open RFP Documents folder. Download templates included in RFP Documents folder. Complete documents and upload to RFP Documents folder. 	
RFP Documents (Read Only)	Here you can do the following actions
🖾 Scope of Work Template 🗸	View folder and edit documents
C RFP Definitions and Acronyms ✓	Replace document(s) on the left
	Mark Complete
Properties Task History	

26. Click on the "Complete RFP Documents" task and select Mark Started.

Related Knowledge	RFP for Consulting Serv	vices		ID SI Tasks: In	t120335798 complete Task	ks: 3
	Sourcing Request			Next Milestone: Se	ubmit Sourcing	Request to OSP
► Expand Projects All Knowledge Areas Search Knowledge	Overview Documents	Tasks Te	am Message Boar	d Event Mess	ages H	istory
	Show: (Any Status)	Required/Optio	nal 🗸 (Any Owner)		\sim]
	RFP for Consulting Services				Actions	- =
	Name		Document	Owner	Status	Due Date
	Notification for New Sour	rcing Requests 🗸	RFP for Consulting Services V	Project Owner	Scheduled	11/20/2020
	Add Team Members to P	roject * 🗸		Austin Bachman	In Progress	
	Complete RFP Documer	nts * 🗸	RFP Documents V	Project Owner	Not Started	11/20/2020
	C Action	XSP * 🗸	RFP for Consulting Services V	Project Owner	Not Started	•
	View Task Details Edit Task Open Folder Mark Started Mark Complete				* Ind	ficates required tas

27. Click on the Documents tab. Open the RFP Documents folder by clicking on it. Click on Scope of Work Template and select Download.

		12			10 00100	1000		
Related Knowledge	RFP for Consulting Services				ID SR120335798 Tasks: Incomplete Tasks: 3			
Expand Projects All Knowledge Areas Search Knowledge	Overview	Documents Action	Tasks Tea	im Message Boar	d Event Messages	History	J	
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- 28. Download the remaining documents in the folder using the same process.
- 29. Complete the Scope of Work Template and the other documents. Once the Scope of Work is complete, return to the Documents tab. Click on Scope of Work Template and select Replace Document.

Related Knowledge	RFP for Consulting Services				ID SR120335798 Tasks: Incomplete Tasks: 3				
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i AP Ariba XXX Intin Bachman (Buttinbachmant)) iast visi scurity Disclosure Privacy Statement Co	e 11/19/2020 9-05 AM State c okie Statement Participan_	Create New Task To Do Review Approval Negotiation Notification			¢ 1995 - J	020 Ariba Inc. All Rights Reserved			

30. The completed Scope of Work can be uploaded by clicking Browse or by dragging and dropping the file into the denoted box. Next click Replace.

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place Document	
ose a document to replace the Original Document and enter a Description to expla	in why the document is being replaced. You can replace the Original Document by More
Original Document: 🕑 Scope of Work Template.docx	
Description:	
New Document: Upload	
	Browse
Or drop file here	
 Replace original document with a document from a pressure or pressure of the second sec	roject
	Replace Cancel

31. You should receive a message stating the file you are uploading does not match the file you are trying to replace. Select "Replace document by the uploaded file" and then click OK.

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32. On the next screen, click Save.

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e these changes as a	new version? 🔘 Yes.	save as v3 O No, save and conti	nue editing v2		
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- 33. Follow the same process to upload the other documents.
- 34. Return to the Tasks tab. Click on the Complete RFP Documents task and select Mark Complete.
- 35. The final task to perform is the "Submit Sourcing Request to OSP" task. This task is an approval task that will route a simultaneous approval to the Team Members designated as Agency Budget and Agency Legal, if applicable. Once the task is approved by Agency Budget and Agency Legal, the approval routes to Agency Approver. Once the Agency Approver approves the task, the Sourcing Request is submitted to OSP. To begin the approval workflow, click on the task and select View Task Details.

Related Knowledge	RFP for Consulting Services Sourcing Request		ID SI Tasks: In Next Milestone: Sc	C120335798 complete Task sbmit Sourcing	ks: 1 Request to OSP
Expand Projects All Knowledge Areas Search Knowledge	Overview Documents Tasks Tea	m Message Boar	d Event Mess	ages H	istory
	Show: (Any Status)	al 🗸 (Any Owner)		\sim]
	RFP for Consulting Services			Actions	•
	Name	Document	Owner	Status	Due Date
	🖞 Notification for New Sourcing Requests 🗸	RFP for Consulting Services V	Project Owner	Scheduled	11/20/2020
	🗸 Add Team Members to Project * 🗸		Austin Bachman	Complete	
	✓ Complete RFP Documents * ✓	RFP Documents V	Austin Bachman	Complete	11/20/2020
	\odot Submit Sourcing Request to OSP * \checkmark	RFP for Consulting Services V	Project Owner	Not Started	٩
	Action View Task Details Edit Task Open Sourcing Request			" Inc	licates required task

36. An initial message may be entered to provide additional information to the approvers.

Approval Task	Cance	ι
This task requires approval on one or more documents. Prior to submitting this task, documents must be ready for approval. You can enter any necess REP for Consulting Services / Submit Sourcing Request to OSP	ary task messages and	More
TSK120509915 Submit Sourcing Request to OSP	Round 1: Not Started	٢
Submit this task to begin the agency approval process. Once the Agency Approver has approved the Request, the Sourcing Request will be submitted to	OSP.	
1. RFP for Consulting Services ∨		
Specify Due Date Days after parent phase starts: None ①		
Fixed Date:		
3. Provide an initial message and click Submit		
$\blacksquare \mathbf{B} \mathbf{I} \mathbf{\underline{U}} \exists \exists -\operatorname{size} - \mathbf{\nabla} \forall \operatorname{erdans} \qquad \mathbf{\nabla} \mathbf{\underline{A}} \underline{\mathbf{\mathcal{A}}} \mathcal{O}$		
These services are mission critical. The estimated cost is \$500,000. Fund XYZ will be used.		
Additional Attachments		
4. Submit		

37. To view the approvers, scroll to the bottom and click on Approval Flow. The specific approvers may be seen by clicking on each group name.

Additional Attachm	ants
4. Submit	
Properties	ask History Approval Flow
Submitted	Pending Agency Legal Pending Agency Approver Approved
< 🔇	Agency Budget
Review Det	ails for Agency Legal
These are the det	ails for the approver you selected.
	ID: PG120509904
	Name: Agency Legal
Users who can a	pprove:
Karen Loftin	

38. If additional approvers need to be added to the workflow, this can be accomplished by clicking the appropriate blue arrow and choosing whether the new approver is a serial approver or parallel approver. A serial approver is sequential whereas a parallel approver receives the approval simultaneously with other approvers.



39. To begin the approval flow, click Submit.

Approval Task	Cancel
his task requires approval on one or more documents. Prior to submitting this task, documents must be ready for approval FP for Consulting Services / Submit Sourcing Request to OSP	I. You can enter any necessary task messages and Mon
SK120509915 Submit Sourcing Request to OSP	Round 1: Not Started 0
ubmit this task to begin the agency approval process. Once the Agency Approver has approved the Request, the Sourcing I	Request will be submitted to OSP.
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These services are mission critical. The estimated cost is \$500,000. Fund XYZ will be used.	
Additional Attachments	

40. You can monitor the approval progress by returning to the task and viewing the Approval Flow.



41. When the Agency Approver approves the task, the Sourcing Request is submitted to OSP. It will be assigned to an OSP Analyst who will contact you regarding the next steps.