



# Drexel University P2P Transformation

Create Sourcing Request

DREXEL UNIVERSITY

# Important: Points to be considered for creating Sourcing Request

- Sourcing Request is the starting point to initiate the competitive bidding/request for proposal (RFP) process and is to be submitted by the business requester (also known as the business stakeholder).
- Please fill out the required header fields and attach any supporting documents

# Create Sourcing Request

- Login to SAP system and Click the 'Create' button at the top right corner of the screen and select 'Guided Sourcing Request'

The screenshot displays the SAP S/4HANA Procurement workspace. At the top, navigation tabs include HOME, SOURCING, CONTRACTS, PROCUREMENT, FOR YOU, and MORE... The 'Create' button is highlighted in the top right corner. A dropdown menu is open, showing various options. Two callouts are present: '1 Click on 'Create' button' pointing to the 'Create' button, and '2 Select Guided Sourcing Request' pointing to the 'Guided sourcing request' option in the dropdown menu. The main content area shows a search bar, a 'Common Actions' sidebar, and a dashboard with charts and tables.

**1** Click on 'Create' button

**2** Select Guided Sourcing Request

Contract Workspace (Procurement) Search using Title, ID, or any other term

Common Actions

- Create
- Contract Workspace (Procurement)
- Contract Request (Procurement)
- Analytical Report
- Quick Survey
- More

Manage

- Public Reports
- Core Administration
- SM Admin
- More

Recently Viewed

Title	Date ↓	Status
OGC Demo 925 pt 2	9/25/2024	Draft

Recent

- Analytical Report
- Compound Report
- Contract Request (Procurement)
- Contract Workspace (Procurement)
- Customer
- Guided sourcing project
- Guided sourcing request

Manage

- Knowledge Project
- Quick Quote Posting
- Quick Survey
- Supplier
- Supplier Research Posting

0 Items

News

Company news content has not been configured by your system administrator.

To Do

Date ↓	Status	Title
9/16/2024	⚠ Not Started	Prepare Sourcing Request (AG_UAT TESTING DEMO)

# Create Sourcing Request (Continued)

- Fill out all required header fields

## Create sourcing request

**Create** **Cancel**

**3** Enter the name of the Sourcing Request

**4** Enter the description as required

**5** Choose Test Project 'No' (Selected by default)

**Name and type**

Name \* (?)

Description (?)

Copy an existing sourcing request [Preview sourcing requests to copy](#)

Test project \* (?)  Yes  No

**Project details**

Linked projects

Predecessor

# Create Sourcing Request (Continued)

Create sourcing request Create Cancel

Predecessor  
 ▼  
[Copy from predecessor project](#)

Base Language  ▼ Departments \* ?  ×  🔍 📄 Baseline Spend/Approved Budget ?   Target Savings % ?

Project Reason \* ?  ▼ Incumbent Supplier ?  Owner ?  🔍 📄 Currency  ▼

Commodity \* ?  ×  🔍 📄

Template

Template \*  ▼

6 Enter the Baseline Spend/Approved Budget

7 Choose the Department from dropdown

8 Type in the Incumbent Supplier

9 Select a Project Reason from the dropdown

# Create Sourcing Request (Continued)

Create sourcing request

Predecessor  
Search predecessors

Copy from predecessor project

Base Language: English

Departments \* (?): Academy of Natural Scie... x Searc... [copy]

Baseline spend approved Budget: [ ] USD

Target savings % (?): [ ]

Project Reason \* (?): New Requirement

Incumbent Supplier (?): [ ]

Owner (?): Ashley Gaston [copy]

Currency: US Dollar

Commodity \* (?): Marine construction and i... x Searc... [copy]

Template

Template \*: Drexel University Sourcing Request Template

Create Cancel

12 Click 'Create'

10 Select a Commodity

11 Select the Template

# Create Sourcing Request (Continued)

- Complete the required tasks in the Sourcing Request

The screenshot shows a web interface for a Sourcing Request. At the top, it displays 'TEST SR 24-09' and 'Strategic sourcing request | SR1297745169 | Original'. Below this are navigation tabs: 'Project summary', 'Tasks', 'Events and other documents', and 'Project message board'. The 'Tasks' tab is active and highlighted. A callout box labeled '13' points to this tab with the text 'Navigate to the 'Tasks' section'. Below the tabs, the 'Tasks' section is titled 'Tasks' and shows 'All (4) | Assigned to me (1)'. A table lists four tasks. The first task, 'Prepare Sourcing Request\*', is highlighted. A callout box labeled '14' points to the 'Set to started' button in the 'Action' column of this task with the text 'Click the button 'Set to started' next to the task 'Prepare Sourcing Request''. The table has columns for checkboxes, task names, Type, Status, Owner, Due date, Approvers or reviewers, Associate a document, and Action.

<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document	Action
<input type="checkbox"/>	Prepare Sourcing Request*	To do	Not Started	JB Jithin B	10/01/2024			Set to started
<input type="checkbox"/>	Assign Sourcing Request Team Members	To do	Not Started	PO Project Owner				
<input type="checkbox"/>	Prepare and Upload Sourcing Requirements*	To do	Not Started	PO Project Owner			Sourcing Requirements	
<input type="checkbox"/>	Approve Sourcing Request*	Approval	Not Started	PO Project Owner		A Administrators	TEST SR 24-09	

# Create Sourcing Request (Continued)

TEST SR 24-09  Close 

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary | **Tasks** | Events and other documents | Project message board

**Tasks** All (4) | Assigned to me (1)

Set to complete Delete ↓ ↑ ↕ 🔍 ⚙️

<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document	Action
<input type="checkbox"/>	Prepare Sourcing Request*	To do	In Progress	 Jithin B	10/01/2024			<span style="border: 1px solid #004a99; padding: 2px 5px;">Set to complete</span>
<input type="checkbox"/>	Assign Sourcing Request Team Members	To do	Not Started	 Project Owner				
<input type="checkbox"/>	Prepare and Upload Sourcing Requirements*	To do	Not Started	 Project Owner			 Sourcing Requirements	
<input type="checkbox"/>	Approve Sourcing Request* 	Approval	Not Started	 Project Owner		 Administrators	 TEST SR 24-09	

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Click the button 'Set to Complete' next to the task 'Prepare Sourcing Request'

# Create Sourcing Request (Continued)

TEST SR 24-09 

Close 

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary | **Tasks** | Events and other documents | Project message board

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Click the button 'Set to started' next to the task 'Prepare and Upload Sourcing Requirements'

<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document	Action
<input type="checkbox"/>	Prepare Sourcing Request*	To do	Complete	 Jithin B	10/01/2024			<input type="button" value="Reset"/>
<input type="checkbox"/>	Assign Sourcing Request Team Members	To do	Not Started	 Project Owner				<input type="button" value="Set to started"/>
<input type="checkbox"/>	Prepare and Upload Sourcing Requirements*	To do	Not Started	 Project Owner			 Sourcing Requirements	<input type="button" value="Set to started"/>
<input type="checkbox"/>	Approve Sourcing Request* 	Approval	Not Started	 Project Owner		 Administrators	 TEST SR 24-09	<input type="button" value="Submit"/>

# Create Sourcing Request (Continued)

TEST SR 24-09 🔗 Close ⋮

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary | Tasks | **Events and other documents** | Project message board

**Events and other documents** All (2) Related to me (0)

Upload Download Move Copy Delete ⌵ ⬆ ⬇ 🔍 ⚙️

<input type="checkbox"/>	Folders and documents	Type	Version	Status	Owner	Last modified on	Last modified by	Associated tasks	Actions
<input type="checkbox"/>	Sourcing Request Items	Event	v1	Not Created	Project Owner	10/01/2024	Jithin B		<span>⋮</span>
<input checked="" type="checkbox"/>	Sourcing Requirements	Folder	Original		Project			Upload Sourcing Requirements	<span>⋮</span>

Drag a file here or [browse](#)

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Navigate to the 'Events and other documents' section

18

Select the folder 'Sourcing Requirements'

19

Click 'Upload' to upload the supporting documents for Sourcing Requirements

# Create Sourcing Request (Continued)

TEST SR 24-09

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary | Tasks | **Events and other documents** | Project message board

## Events and other documents

Search

<input type="checkbox"/>	Folders and documents	Type	Version	Status	Owner
<input type="checkbox"/>	Sourcing Request Items	Event	v1	Not Created	PO
<input checked="" type="checkbox"/>	Sourcing Requirements	Folder	Original		PO

Open

This PC > Downloads

Search Downloads

Organize New folder

Name	Date modified
Today (3)	
Sourcing Requirements	10/2/2024 9:53 AM
QRG- Ad-hoc Review (1)	10/2/2024 8:41 AM
Yesterday (1)	
Contract	
QRG- Ad	
IC Agreement - OGC FINAL 63024 fillable	10/1/2024 4:01 PM
Last week (6)	
Knowledge Transfer Topics	9/27/2024 8:32 AM
(Pivot Area Pie Excel2007)	9/25/2024 2:48 PM

File name: Sourcing Requirements

All files

Upload from mobile Open Cancel

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Select the document from your desktop and click 'Open'

# Create Sourcing Request (Continued)

TEST SR 24-09 

Close 

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary

**Tasks**

Events and other documents

Project messages

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Click the button 'Set to complete' next to the task 'Prepare and Upload Sourcing Requirements'

Tasks

All (4) | Assigned to me (1)

Search



Create

Cancel optional tasks

Delete



<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document	Action
<input type="checkbox"/>	Prepare Sourcing Request*	To do	Complete	 Jithin B	10/01/2024			<input type="button" value="Reset"/>
<input type="checkbox"/>	Assign Sourcing Request Team Members	To do	Not Started	 Project Owner				<input type="button" value="Set to started"/>
<input type="checkbox"/>	Prepare and Upload Sourcing Requirements*	To do	In Progress	 Project Owner			 Sourcing Requirements	<input type="button" value="Set to complete"/>
<input type="checkbox"/>	Approve Sourcing Request* 	Approval					 TEST SR 24-09	<input type="button" value="Submit"/>

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Click 'Submit' button next to 'Approve Sourcing Request' to submit the Sourcing Request for approval

# Create Sourcing Request (Continued)

TEST SR 24-09 

Strategic sourcing request | SR1297745169 | Original | Active | Gray

Project summary | **Tasks** | Events and other documents | Project message board

**Tasks**

- Phases and tasks Type
- Prepare Sourcing Request\* To do
- Assign Sourcing Request Team Members To do
- Prepare and Upload Sourcing Requirements\* To do
- Approve Sourcing Request\*  Approva

Submit

Comments (optional)

Submitted

[Attach a file](#)

**Submit** Cancel

23 Add any comments for the approver

24 Click 'Submit'

All (4) Assigned to me (1)

Cancel optional to Delete

or reviewers Associat

Reset

Set to started

Sourcing Requirements Reset

Administrators TEST SR 24-09 Submit

# Create Sourcing Request (Continued)

 **Test Site** Search Chat Help Global

Customize

## TEST SR 24-09 🔗 Close

Strategic sourcing request | SR1297745169 | v1 | Active | Gray

Project summary | **Tasks** | Events and other documents | Project message board

### Tasks All (4) | Assigned to me

🔍 🔄 Create ▾ Cancel optional tasks Delete ⌵ ⬆️ ⬆️ ⬆️ 🔍

<input type="checkbox"/>	Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document	Action
<input type="checkbox"/>	Prepare Sourcing Request*	To do	Complete	 Jithin B	10/01/2024			<span>Reset</span>
<input type="checkbox"/>	Assign Sourcing Request Team Members	To do	Not Started	 Project Owner				<span>Set to started</span>
<input type="checkbox"/>	Prepare and Upload Sourcing Requirements*	To do	Complete	 Project Owner			<span>📁 Sourcing Requirements</span>	<span>Reset</span>
<input type="checkbox"/>	Approve Sourcing Request* <span>🔗</span>	Approval	In Approval	 Project Owner		 Administrators	<span>📁 TEST SR 24-09</span>	<span>Withdraw</span>

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Click the Drexel University logo to navigate back to the SAP home screen