

Navigating the Sourcing Project

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Adding to Watched Projects

- On the Overview tab of the Sourcing Project click on 'Actions' and select 'Add to Watched Projects' from the dropdown menu.

The screenshot shows the 'In-Depth Sourcing Project' overview page. The 'Overview' tab is selected. A dropdown menu is open under the 'Actions' button, with 'Add to Watched Projects' highlighted. The project details are as follows:

- ID: WS231589445
- Project State: Active
- Version: Original
- Project Status: Gray
- Start Date: 06/23/2021
- Due Date:
- Owner: Austin Bachman
- Estimated Value: \$1,321,346,431 USD
- Contract Length (in months):
- Contract Start Date:
- Process Status:
- Commodity: ALKALINIZING AGENTS 51191... View more
- Test Project: Yes
- Base Language: English

- Notice on your dashboard that this project is now listed under 'Watched Projects'. From here, you can easily access the project by clicking on the name.

The screenshot shows the dashboard with the 'Watched Projects' section highlighted. The dashboard includes a navigation bar with 'HOME', 'SOURCING', 'CONTRACTS', and 'SUPPLIERS'. A search bar is present with the text 'Sourcing Project' and a search icon. The 'Watched Projects' list contains the following items:

- In-Depth Contract Workspace
- In-Depth Sourcing Project**
- Non-Income Tax Debt Management and Collection System
- RFP for Collection Services for Tax and Non-Tax Debt for LDR
- RFP for Estimation of Retained and Unretained Bycatch from the Commercial Menhaden Fishery off of Louisiana
- RFP for New Teacher Experience Affinity Groups for LDOE
- RFP for USDA Child Nutrition Program Monitor, Technical Assistance, and Training for LDOE

Below the list, there are two widgets: 'Event Status' showing a donut chart with 1 Draft and 1 Pending Selection, and 'Expiring Contracts' showing 0 Expiring Contracts.

- Once you finish with the project if you can easily remove it from your 'Watched Projects' by following the same steps as above and selecting 'Remove from Watched Projects' from the drop down.

In-Depth Sourcing Project
Sourcing Project

Related Knowledge
 ▶ Expand Projects
 All Knowledge Areas
 Search Knowledge

Overview | Documents | Tasks | Team | Message Board | Event Messages

Overview

ID: WS231589445 ⓘ
 Project State: Active ⓘ
 Version: Original
 Project Status: Gray
 Start Date: 06/23/2021 ⓘ
 Due Date: ⓘ
 Owner: Austin Bachman ⓘ
 Estimated Value: \$1,321,346,431 USD ⓘ
 Contract Length (in months):
 Contract Start Date: ⓘ
 Process Status: ⓘ
 Commodity: ALKALINIZING AGENTS 51191... [View more](#)
 Test Project: Yes ⓘ

Actions Process

- View Overview
- View Details
- Move
- Create
- Copy Project
- Follow-on Project
- Delete
- Delete Project
- Display
- Compact View
- Remove from Watched Projects**

Welcome to the project!

Overview Tab

- This tab shows the information that was added while creating the Sourcing Request.

In-Depth Sourcing Project
Sourcing Project

ID WS231589445
 Tasks: Incomplete Tasks: 33
 Current Phase: Requirements Gathering

Overview | Documents | Tasks | Team | Message Board | Event Messages

Overview

ID: WS231589445 ⓘ
 Project State: Active ⓘ
 Version: Original
 Project Status: Gray
 Start Date: 06/23/2021 ⓘ
 Due Date: ⓘ
 Owner: Austin Bachman ⓘ
 Estimated Value: \$1,321,346,431 USD ⓘ
 Contract Length (in months):
 Contract Start Date: ⓘ
 Process Status: ⓘ
 Commodity: ALKALINIZING AGENTS 51191... [View more](#)
 Test Project: Yes ⓘ
 Base Language: English
 Currency: US Dollar
 Agency: 820 Office of State Proc... [View more](#)
 Resourced By: No Choice ⓘ
 Project Reason: No Choice ⓘ
 Sourcing Method: RFP ⓘ
 Origin: Ariba Sourcing ⓘ
 Access Control: Private To Team Members ⓘ
 OSP Team: RFP 1 ⓘ
 T-Number: ⓘ
 PST: Yes ⓘ
 Contract Type: Complex Services ⓘ
 Recurring RFP: No ⓘ
 Request Submission Date: Wed, 23 Jun, 2021
 RFP Award Date:

Process

- Requirements Gathering
 - Solicitation
 - Publish RFP
 - OSP Award Concurrence
 - Project Closeout

Quick Links [All Documents](#)

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Announcements [New](#) [Details](#)

Welcome to the project! 6/23/2021
Austin Bachman

- The 'Process' section shows a list of the upcoming tasks for the project.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

Overview Actions Process All Tasks

ID: WS231589445 ⓘ
Project State: Active ⓘ
Version: Original
Project Status: Gray
Start Date: 06/23/2021 ⓘ
Due Date: ⓘ
Owner: Austin Bachman ⓘ
Estimated Value: \$1,321,346,431 USD ⓘ
Contract Length (in months):
Contract Start Date: ⓘ
Process Status: ⓘ
Commodity: ALKALINIZING AGENTS 51191... View more
Test Project: Yes ⓘ
Base Language: English
Currency: US Dollar

Requirements Gathering
Solicitation
Publish RFP
OSP Award Concurrence
Project Closeout

Quick Links All Documents

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Announcements New Details

Welcome to the project! 6/23/2021 Austin Bachman

- The 'Quick Links' section allows you to add certain documents that you can easily access from the Overview Tab.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

Overview Actions Process All Tasks

ID: WS231589445 ⓘ
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Contract Start Date: ⓘ
Process Status: ⓘ
Commodity: ALKALINIZING AGENTS 51191... View more
Test Project: Yes ⓘ
Base Language: English
Currency: US Dollar

Requirements Gathering
Solicitation
Publish RFP
OSP Award Concurrence
Project Closeout

Quick Links All Documents

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Announcements New Details

Welcome to the project! 6/23/2021 Austin Bachman

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

Overview

Actions

All Tasks

ID: WS231589445 ⓘ
Project State: Active ⓘ
Version: Original
Project Status: Gray
Start Date: 06/23/2021 ⓘ
Due Date: ⓘ
Owner: Austin Bachman ⓘ
Estimated Value: \$1,321,346,431 USD ⓘ
Contract Length (in months):
Contract Start Date: ⓘ
Process Status: ⓘ
Commodity: ALKALINIZING AGENTS 51191... [View more](#)
Test Project: Yes ⓘ
Base Language: English
Currency: US Dollar
Agency: 820 Office of State Procurement... [View more](#)
Resourced By: No Choice ⓘ

Requirements Gathering
Solicitation
Publish RFP
OSP Award Concurrence
Project Closeout

Quick Links

All Documents

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Announcements

New Details

Welcome to the project! 6/23/2021 Austin Bachman

Documents Tab

- This tab holds all the documents needed in order to create and publish the RFP.
- The documents are stored in their appropriate folders.

Louisiana

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

In-Depth Sourcing Project

Show Details Actions

Name	Owner	Status
RFP Event Template	Project Owner	Not Created
BAFO	Project Owner	Not Created
RFP Documents	Project Owner	
Oral Presentations	Project Owner	
COA Docs	Project Owner	
LaPAC and Advertisement	Project Owner	
Questions and Answers	Project Owner	
Evaluation Documents and Award Recommendation	Project Owner	
PST	Project Owner	
Project Documents	Project Owner	
Miscellaneous Documents	Project Owner	

- To access the documents click the arrow to expand the folder.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
 Tasks: Incomplete Tasks: 33
 Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

In-Depth Sourcing Project

Show Details

Actions

Name	Owner	Status
RFP Event Template	Project Owner	Not Created
BAFO	Project Owner	Not Created
RFP Documents	Project Owner	
RFP Document	Project Owner	Not Edited
Scope of Work	Project Owner	Not Edited
Proposal Evaluation	Project Owner	Not Edited
Definitions and Acronyms	Project Owner	Not Edited
Insurance Requirements for Contractors	Project Owner	Not Edited
Sample Contract	Project Owner	Not Edited
Proposer Questionnaire Template	Project Owner	Not Edited
Oral Presentations	Project Owner	

- You may also click on the Table Options Menu and select 'Expand All' to expand all of the document folders at once.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
 Tasks: Incomplete Tasks: 33
 Current Phase: Requirements Gathering

Overview Documents Tasks Team Message Board Event Messages

In-Depth Sourcing Project

Show Details

Actions



Name	Owner	Status	Show / Hide Columns
RFP Event Template	Project Owner	Not C	<input checked="" type="checkbox"/> Name
BAFO	Project Owner	Not C	<input checked="" type="checkbox"/> Owner
RFP Documents	Project Owner		<input checked="" type="checkbox"/> Status
Oral Presentations	Project Owner		Modified By
COA Docs	Project Owner		Last Modified
LaPAC and Advertisement	Project Owner		Document Type
Questions and Answers	Project Owner		Creation Date
Evaluation Documents and Award Recommendation	Project Owner		Outline Expansion
PST	Project Owner		<input checked="" type="checkbox"/> Expand All
Project Documents	Project Owner		<input type="checkbox"/> Collapse All
Miscellaneous Documents	Project Owner		Export to Excel
			Export all Rows
			Export Current Page

- To open a document click on the drop down arrow next to the file name and select 'Download'.

In-Depth Sourcing Project ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Sourcing Project

Overview Documents **Tasks** Team Message Board Event Messages

In-Depth Sourcing Project Show Details Actions

Name	Owner	Status
RFP Event Template	Project Owner	Not Created
BAFO	Project Owner	Not Created
RFP Documents	Project Owner	
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited
RFP Document	Project Owner	Not Edited

Tasks Tab

- This tab breaks up the procedures into individual tasks to allow for a high level view of where we are in the process.
- There are three (3) phases within each project: Requirements Gathering, Solicitation, and Project Closeout.

In-Depth Sourcing Project ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

Sourcing Project

Overview Documents **Tasks** Team Message Board Event Messages

Show: (Any Status) Required/Optional (Any Owner)

In-Depth Sourcing Project Actions

Name	Document	Owner	Status	Due Date
Requirements Gathering		Project Owner	In Progress	
Solicitation		Project Owner	Not Started	
Project Closeout		Project Owner	Not Started	

- Requirements Gathering Phase deals with all of the tasks that are required to finalize the documents needed to develop the RFP.
- Solicitation Phase is where the RFP event comes together. It contains all the tasks starting with final OSP approval of the RFP event, goes through publication, any required addenda, evaluations, and ends with consensus and the award recommendation.
- Project Closeout Phase is the final phase that includes administrative tasks to document lessons learned and complete the RFP.

- Within each phase are a list of tasks that will need to be completed. Those tasks with a red asterisks indicate it is a required task.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 33
Current Phase: Requirements Gathering

In-Depth Sourcing Project				
Name	Document	Owner	Status	Due Date
▾ ▹▹ Requirements Gathering ▾		Project Owner	In Progress	
🕒 Project kickoff prep ▾	Project Documents ▾	Project Owner	Not Started	
🕒 Project Kickoff Meeting * ▾		Project Owner	Not Started	
🕒 Review for Scope of Work * ▾	Scope of Work ▾	Project Owner	Not Started	
🕒 Commissioner Approval to Use the RFP Process * ▾	COA Docs ▾	Project Owner	Not Started	
🕒 OSP Approval of Multi-Year Contract * ▾	Multi-Year Contract Approval ▾	Project Owner	Not Started	
🕒 OSP Approval for Mandatory Conference or Site Visit * ▾	Mandatory Conference or Site Visit Approval ▾	Project Owner	Not Started	
🕒 Market Research ▾		Project Owner	Not Started	
🕒 Develop RFP documents * ▾	RFP Documents ▾	Project Owner	Not Started	
🕒 Agency Review of RFP Documents * ▾	RFP Documents ▾	Project Owner	Not Started	
🕒 OSP Review of RFP Documents * ▾	RFP Documents ▾	Project Owner	Not Started	

- To know the status of the task you can look at the icon next to the project name as well as the status column.
 - The checkmark indicates that the task has been completed.
 - The notepad indicates that the task is in progress/review and the due date can be found in the 'Due Date' column.
 - The clock indicates that the task has not yet been started.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
Tasks: Incomplete Tasks: 23
Current Phase: Requirements Gathering

Non-Income Tax Debt Management and Colle...				
Name	Document	Owner	Status	Due Date
▾ ▹▹ Requirements Gathering ▾		Project Owner	In Progress	08/25/2022
✓ Project kickoff prep ▾	Project Documents (v1/1) ▾	Elizabeth Kunjappy	Complete	
✓ Project Kickoff Meeting * ▾		Elizabeth Kunjappy	Complete	
✓ Market Research ▾		Elizabeth Kunjappy	Complete	
📄 Review for Scope of Work * ▾	72222 SOW Sent to OSP Non-Income Tax Debt Management and Collection System SOW BP 07112022 ▾	Elizabeth Kunjappy	In Review	08/25/2022
🕒 OSP Approval of Multi-Year Contract * ▾	Multiyear Contract Justification Letter (6 27 2022) ▾	Project Owner	Not Started	
📄 Develop RFP documents * ▾	RFP Documents ▾	Elizabeth Kunjappy	In Progress	
🕒 Project Lead(s) Review of RFP Documents * ▾	RFP Documents ▾	Project Owner	Not Started	
🕒 Evaluation Committee Review of RFP Documents * ▾	RFP Documents ▾	Project Owner	Not Started	
🕒 OSP Review of RFP Documents * ▾	RFP Documents ▾	Project Owner	Not Started	

- If you are unsure of what is required of the task click the drop down arrow next to the task name and select 'View Task Details'.

In-Depth Sourcing Project

Sourcing Project

ID WS231589445
 Tasks: **Incomplete Tasks: 33**
 Current Phase: Requirements Gathering

In-Depth Sourcing Project				
Name	Document	Owner	Status	Due Date
▼ Requirements Gathering ▼		Project Owner	In Progress	
🕒 Project kickoff prep ▼	Project Documents ▼	Project Owner	Not Started	
🕒 Project Kickoff Meeting * ▼		Project Owner	Not Started	
🕒 Review for Scope of Work ▼	Scope of Work ▼	Project Owner	Not Started	
🕒 Review for the RFP Process * ▼	COA Docs ▼	Project Owner	Not Started	
🕒 Review Contract * ▼	Multi-Year Contract Approval ▼	Project Owner	Not Started	
🕒 Review Conference or Site Visit * ▼	Mandatory Conference or Site Visit Approval ▼	Project Owner	Not Started	
🕒 Review Development Documents ▼	RFP Documents ▼	Project Owner	Not Started	

- Here on the Properties tab you can read what is required of this task along with the documents associated with it. You can also see if there is a due date to complete this task.

Review Task

Exit

The document associated with this task is in **Not Edited** status. **Update** the document as necessary and then mark this task **In Progress**. **Notification on Comment** sends an email notification if comments are added to the task.

In-Depth Sourcing Project / Requirements Gathering / Review for Scope of Work

TSK231649702 Review for Scope of Work

Round 1: Not Started ⓘ

SPA works with Agency to complete Scope of Work.

📄 Scope of Work ▼

Properties

Task History

Review Flow

Basic Details

Actions ▼

Status: Not Started
 Owner: Project Owner ⓘ
 Due Date: ⓘ
 Start Date: ⓘ
 Committed Due Date: ⓘ
 Reviewers: (no value)
 Approval Rule Flow Type: Custom
 Observers: (no value) ⓘ
 Is milestone: No ⓘ
 External Task Response:
 Required: Yes ⓘ
 Repeat for Each Document Draft: No ⓘ
 Predecessors:

▶ Advanced Task Details

Expand to view the contents of this section.

- The Task History tab will show the comments between the agency and OSP regarding this task in either a threaded or a chronological order. To change this select 'Threaded' and choose your preference.

TSK292275537 Review for Scope of Work Round 1: Reviewed ⓘ

SPA works with Agency to complete Scope of Work.

Scope of Work (4) ▾

This task has been completed. You can do any of the following:

- Review the comments or document changes made by the reviewer on the **Task History** tab.
- **New Round** Initiate a New Round if necessary. Examples of when you might need a **New Round** include if the previous round was denied, or if the document has changed since the previous round.
- **Publish** Publish the document(s) on the left.
- **Replace** Replace the document(s) on the left.

Properties **Task History** Review Flow

Threaded

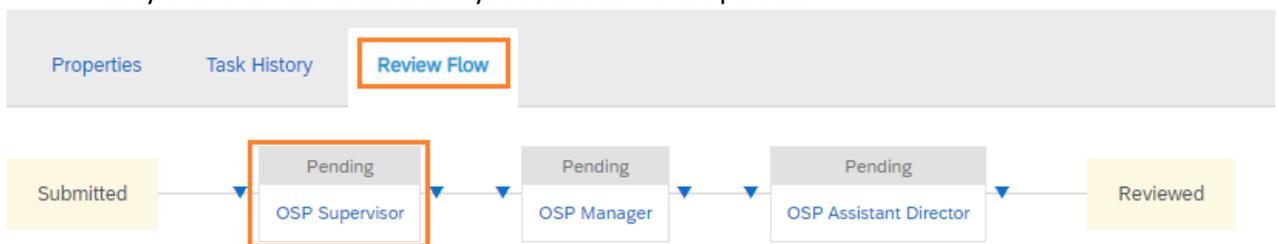
Owner	Date
<p>▼ Monica Clark ▾</p> <p>My suggested revisions and comments are in the attached document.</p>	10/12/2021 02:27 PM
<p>Karen Evans ▾</p> <p>approving SOW</p>	10/12/2021 02:33 PM
<p>Karen Evans ▾</p> <p>Reviewed</p>	10/12/2021 02:37 PM
<p>Karen Evans ▾</p> <p>No changes on SOW</p>	10/12/2021 02:37 PM
<p>Monica Clark ▾</p> <p>Completed</p>	10/12/2021 03:01 PM

Properties **Task History** Review Flow

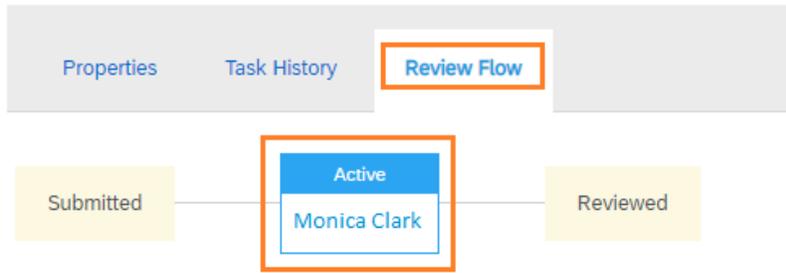
Threaded

Owner	View
<p>▼ Monica Clark ▾</p> <p>My suggested revisions and comments are in the attached document.</p>	<p>Threaded</p> <p>Chronological</p>
<p>Karen Evans ▾</p> <p>approving SOW</p>	

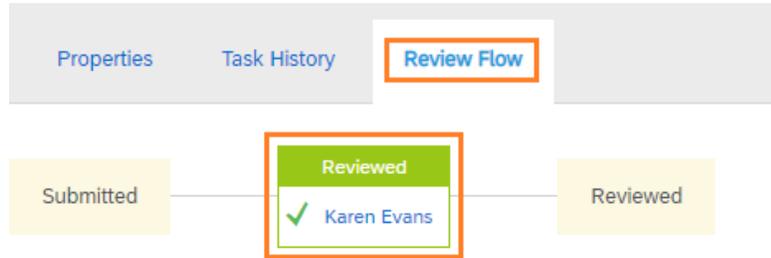
- The Review Flow tab will show everyone who needs to review the task.
 - Gray indicates the task has not yet been sent to the person.



- Blue indicates the task has been sent to the person and they are reviewing it.



- Green indicates the task has been completed by the person.

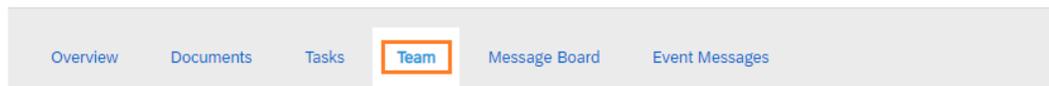


Teams Tab

- In order to view the project you must be listed on this tab.

RFP for TBMO Amy for OSP

Sourcing Project



Team Members

Group ↑	Members
Agency	(none)
Agency Approver	Austin Bachman
Agency Legal	(none)
Agency Project Lead(s)	Monica Clark
Evaluation Committee	Monica Clark, Anna Cox
OSP Assistant Director	Austin Bachman
OSP Manager	Stephanie Horvath
OSP Observers	OSP Users
OSP Supervisor	Elizabeth Kunjappy
Project Owner	Amy York
Subject Matter Expert	(none)
Surrogate Bidder	Surrogate Bidders

- Agency Approver is not necessarily the person who has the delegation to make purchases for the agency. It is someone at the agency that is above the level of the end user.
- Agency budget and legal are conditional groups. These can be selected when creating the Sourcing Request.
- Observers – anyone at the agency that needs access that is not assigned a specific role.

Message Board

- Each Message Board in LESA has a unique email address associated with it.
- You can send an email to the unique email address and CC the person you want to communicate with and LESA will capture the entire email chain and add it to the Message Board.
- To find the unique email address click on the Message Board tab and 'Post via Email'

Sourcing Project Tasks: **Incomplete Tasks: 19**
Current Phase: Requirements Gathering

Overview Documents Tasks Team **Message Board** Event Messages History

Search Filter (All) Search Options ▾

Title: Keywords:

Search

Topics **Post via Email**

<input type="checkbox"/>	Title	Created By	Labels	Replies	Last Post Date ↓	Last Post By
<input type="checkbox"/>	Welcome to the project!	Monica Clark	Announcement	0	02/01/2022 02:19 PM	Monica Clark

↳

- The email address will then appear. You can click on the hyperlink or copy and paste it into your email message and send as you normally would.

Post via Email

The email address below is unique to this workspace and can be used to post a topic or reply to the message board. The posts are threaded based on title, and include email attachments. Internal users, as well as any external parties can post through email, as long as the message is less than 10 MB.

email2workspace-prod3+louisiana+WS359995079+zsxz@ansmtp.ariba.com

- Once the email is sent it can now be found in the Message Board

Overview Documents Tasks Team **Message Board** Event Messages History

Search Filter (All) Search Options ▾

Title: Keywords:

Search

Topics Post via Email

<input type="checkbox"/>	Title	Created By	Labels	Replies	Last Post Date ↓	Last Post By
<input type="checkbox"/>	Project Kick Off	"Monica Clark (DOA)" <Monica.Clark2@la.gov>	(no value)	0	08/25/2022 01:13 PM	"Monica Clark (DOA)" <Monica.Clark2@la.gov>
<input type="checkbox"/>	Welcome to the project!	Monica Clark	Announcement	0	10/12/2021 01:15 PM	Monica Clark

↳

Event Messages

- Messages will only populate once the event is published.
- Once published messages regarding the published event will show here.

Overview Documents Tasks Team Message Board **Event Messages** History

No messages are displayed because no events or surveys have been published for the project or you do not have permission to view the published events or surveys.

Messages



Event	From	Contact Name	Subject	Id	Reply Sent	Sent Date ↓
No items						

History Tab

- This is an audit log from creation to completion.
- This tab may or may not show depending on the permissions the user has.