Creating a Sourcing Request in LESA

This document describes the procedure for creating a Sourcing Request.

1. Log into LESA (<u>www.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	↓ urement)	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 Request		
To create a Sourcing Request, sp	ecify the fields below. Templates used for constructing your Sourcing Request	appear in the
Name *	Untitled Sourcing Request	(i)
Description:		0
Copy from Project:	(no value) 🗸	
Test Project *	Yes 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	appear	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	opear i	
Name: *	RFP for Consulting Services	(j)	
Description:	A consultant is needed to assist our agency with modernizing our work processes.	i	
Copy from Project:	(no value) V		
Test Project: *	Yes 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	ecify 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) V		
Test Project: *	Ves No i		
Base Language:	English 🗸		
Statewide/Region(s)/Parish(es):	(no value) 🗸		
Agency: *	All Statewide		
	R2 Region 2		
Estimated Value:	Q Search more		

Add to Curre	ently Selected		Currently Selected
Region v		Search	Description † Region
Descript	ion †	Region	No items
📃 🔻 st	atewide	All	<
	Region 1	R1	
	Jefferson	JEF	
	Orleans	ORL	
	Plaquemines	PLA	
	St. Bernard	STB	
✓	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.

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To create a Sourcing Request, sp	ecify the fields below. Templates used for constructing your Sourcing Reque	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) V		
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 v processes.	vork		
Copy from Project:	(no value)			
Test Project: *	Yes 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)			

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

Create Sourcing Request			
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) V		
Test Project: *	Ves 🔵 No í		
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 Choice 🗸 🗸		
Recurring RFP: *	Contract Expiring		
Previous RFP Transmittal: *	New Requirement 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: *	Yes No ()				
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 \times				
Estimated Value: *	\$500,000 USD (i)				
Project Reason:	No Choice v i				
Predecessor Project:	(no value) v				
Recurring RFP: *	Ves No ()				

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, specify the fields below. Templates used for constructing 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) 🗸			
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 (i)			
Project Reason:	No Choice 🗸 🛈			
Predecessor Project:	(no value) v i			
Recurring RFP: *	● Yes ◯ No ①			
Previous RFP Transmittal: *	0			
Previous Protest? *	─Yes ─No ()			

- b. In Previous RFP Transmittal, enter the Sourcing Request ID if the previous RFP was processed in LESA, the ProAct Transmittal number if the previous RFP was processed in ProAct, or the Shopping Cart number if the previous RFP was processed in DocTracking.
- c. For Previous Protest?, select Yes if the immediately previous 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 wi processes.	th modernizing our work (i)
Copy from Project:	(no value) 🗸	
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	
Estimated Value: *	\$500,000 USD (i)	
Project Reason:	No Choice 🗸 🔾	
Predecessor Project:	(no value) 🗸 🗸	D
Recurring RFP: *	● Yes ◯ No (i	
Previous RFP Transmittal: *	3000015842 (j	
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	ecify the fields below. Templates used for constru	cting your Sourcing Reque	st appear in the sectio	n at the bottom of the page	e, and available Templates More
Name: *	RFP for Consulting Services		0		
Description:	A consultant is neecled to assist our agency with modernizing our work processes.		C		
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 Rogian 2 🗸 🗸	Add more	Curre	ncy: US Dollar	\sim
	${\rm ORL} \ {\rm Orleans} \qquad \qquad \times$		Commo	dity: * (no value)	\sim
Agency:	405 Avoyelles Correctional Center \sim	Add more		DIESEL FUEL 151019	05
	408 Allen Correctional Center \times			GASOLINE OR PETRO	DL 15101506
Estimated Value: *	\$500,000 USD ()				ANCE SERVICES, 72101506
Project Reason:	No Choice V			Q Search more	IMENT 8412

Choose Values for Commodity	
Add to Currently Selected	
Name 🗸 consult Search	
Name 1	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. 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. 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	ct a template
Select	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.
	OSP Sourcing Request
Г	Use this template to create a Sourcing Request.
	Does your legal section need to review the documents prior to submittal to OSP? No 🗸
	Does your budget section need to review the request prior to submittal to OSP? No 🗸
L	

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

COSP Securing Respirat	
the true peoplede to create a Sourcey Research.	
What lapse of TPP by the 27	[.thismen →]
Has the agency surveyed potential suppliers, examined market conditions, or researched market offerings	1 40 V
. Here, you single we income the every the dimensionle prior to submit to the $\rm MeV$	The v
Consignal and an investigation was been appendipted to a standard to 051%	No. V

15. Now that you have created the Sourcing Request, the activities to be completed to submit the Sourcing Request to OSP may be found in the Completing and Submitting a Sourcing Request Help Script.