OVERVIEW **Audience:** External Suppliers

▪ The purpose of this Quick Reference Guide (QRG) is to demonstrate the process of participating in a Sourcing Event initiated by Puget Sound Energy (PSE) via the SAP Ariba system. It is intended for Suppliers that are invited to participate in a Sourcing RFx event in Ariba.

Quick Steps

1. Access the PSE Sourcing Event
2. Review and Accept Event Prerequisites
3. Select Lots to Participate on
4. Complete and Submit the Response
5. Monitor Event Status and View Awards

Step 1: Access the PSE Sourcing Event

When invited by PSE to participate in a Sourcing Event, you will receive an automated email notification with the high-level Sourcing Event details and links to participate.

A. Open the email upon receiving and review event details, including start and end dates

B. To view and respond to the event, click **"Click Here to access this event"**

  ▪ This will open the Ariba Supplier Login page.

C. If you have an active account and approved PSE Supplier Profile, click **"Log in"** and enter your username and password, then proceed to Step 2.

  ▪ *Note: An Ariba Commerce Cloud account is required to view and respond to the Sourcing Event. Click 'Sign Up' if needed.*
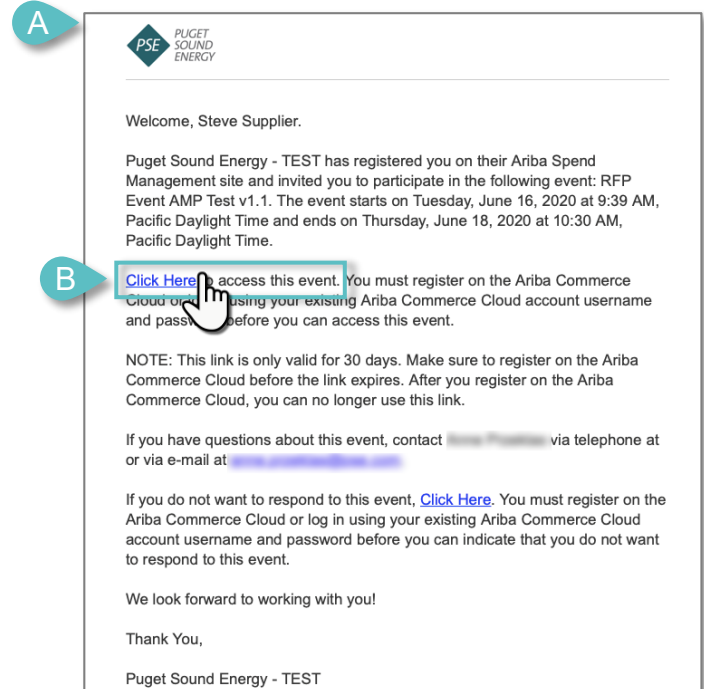
Alternative Method – Accessing the Event in Ariba:

*For suppliers with an active Ariba Commerce Cloud account and approved PSE Supplier Profile, the open Sourcing Event can be accessed by logging into your Ariba Supplier account and navigating to the 'Events' section of the **Ariba Proposals and Questionnaires** page.*

Step 2: Review and Accept Event Prerequisites

After opening the event in Ariba, you will be directed to a page with all details associated with the event, as well as the next steps to respond.

TIP: Notice the countdown in the upper right corner to keep track of the time remaining before the Event closes and is no longer accepting responses from suppliers.

A. The event prerequisites must be reviewed and accepted before submitting a response. To participate in the event, click **"Review Prerequisites"**

- If you do NOT intend to participate in the Sourcing Event, click **"Decline to Respond"**

From the Prerequisites page:

B. Read carefully through the prerequisite agreement content

C. Select **"I accept the terms of this agreement"**

D. Click **"OK,"** then confirm the submission in the pop-up box that appears

Upon accepting the prerequisites, you will be navigated to a page where you will select the lots in which you will participate in.

Step 3: Select Lots

A. Select the lots in which you intend to bid on by clicking in the check box next to the lot name

- ▪ To participate in <u>all</u> lots, click the open box at the top of the table. *This will automatically select all.*

B. Once all appropriate lots are selected, click **"Confirm Selected Lots"**

Step 4: Complete and Submit the Response

After accepting the prerequisites and selecting the lots to participate in, you are ready to begin reviewing the event contents and completing your response details.

Review & Navigate Event Contents

To navigate through the event contents, use the menu organized by section on the left side OR use the Outline Icon to expand and collapse table sections and rows as needed.

💡 **TIP:** *Use the buttons on the event console page as appropriate while working on your response:*

➢ **Save draft:** Saves your response progress and prevents data loss. *You can use this to continue working on your response at a later time before submitting to PSE (as long as submitted before the end time).*

➢ **Compose Message:** Allows you to communicate with PSE throughout the event as needed. *All correspondences will be logged in the 'Event Messages' section in the upper left side of the event.*

➢ **Excel Import:** Allows you to review & answer event content offline in Excel, then import into the online event. *Detailed Instructions will appear upon clicking.*

Step 4: Complete and Submit the Response (continued)

Enter Response & Submit

A. Enter the bid details and all other requested information within the fields of the All Content table

- **Note:** Fields marked with an asterisk (*) are <u>required</u> to be answered in order to submit the response.
- If desired/applicable, click the **"Update Totals"** button to automatically calculate the extended price of items bid on. *The totals will appear in the "Extended Price" column.*

B. Once all required fields are complete and your bid is finalized, click **"Submit Entire Response"** (located below the All Content table)

C. Click **"OK"** to confirm submission on the pop-up box that appears

- A message will appear as a banner on the Event Console page confirming your submission.

### Revising Response & Viewing History (as needed)

- The option to **"Revise Response"** will also appear on this page if changes are required to your response after submitting. This will remain available up until the Event due date.
- To view the responses you previously submitted to the Sourcing Event, click **"Response History"** on the left side. This will open a page displaying the record of responses and details.

Step 5: Monitor Event Status and View Awards

All events you have responded to will appear on your **Ariba Proposals and Questionnaires** homepage dashboard for viewing and reference as needed.

Monitor Event Status

The status of events you have participated in can be monitored from the **'Events'** section of this page, which is organized by the status of each event (sorted alphabetically).
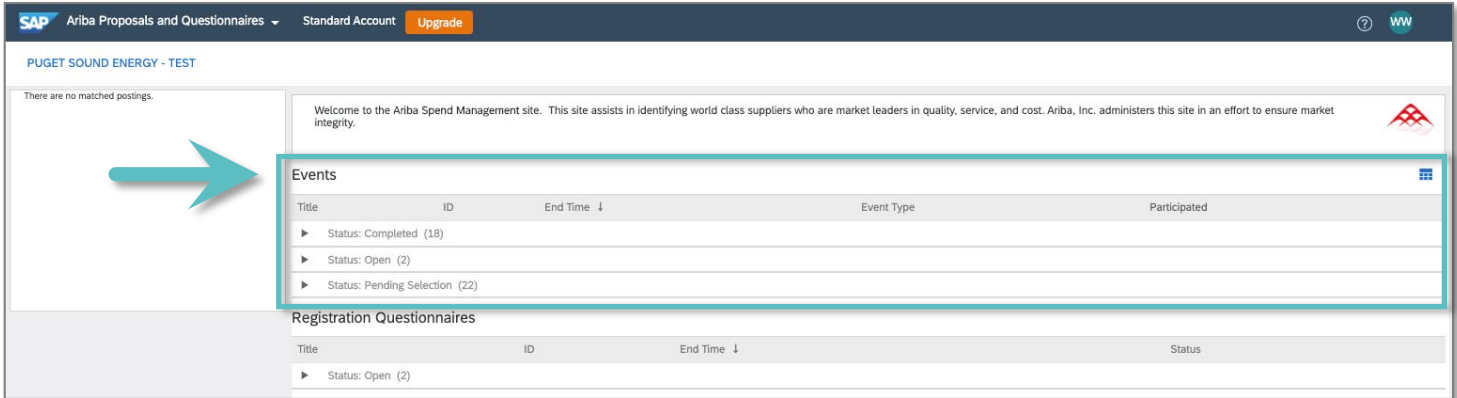

Event Status Definitions:

- **Completed:** PSE has awarded the business.
- **Open:** Event is actively accepting responses up until the end time.
- **Pending Status:** Event and response(s) submitted can be viewed, but responses can no longer be submitted to PSE.
- **Preview:** Event can be viewed, but responses cannot yet be submitted to PSE.

View Awarded Business in a Completed Event

A. Click on the **Event Name** to open
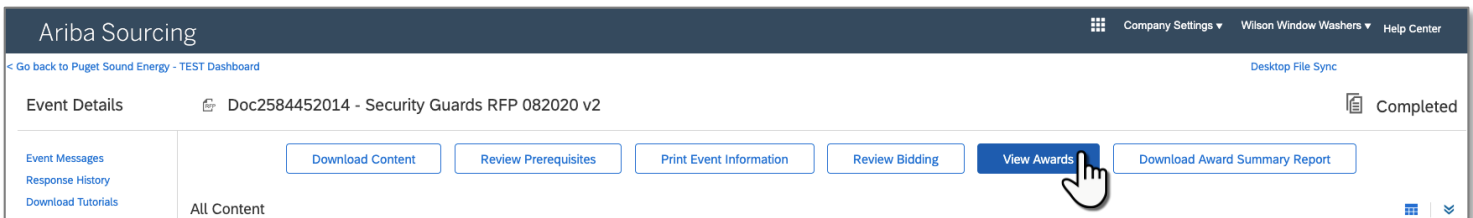
B. Click **"View Awards"**
   A. Alternatively, click **"Download Award Summary Report"** to download the summary as a Microsoft Excel file and review offline.
C. Navigate to the lots you placed bids on in the Content table
D. Click **"Done"** to return to the Event Details page