

Sourcing Event Approval

- After creating a sourcing event, it needs approval from designated approvers before it can be published. The Designated Approver(s) in the Sourcing Event Workflow will receive an email and an 'Action Item' (Flag Icon) in JAGGAER that the Request form has been submitted and is in Workflow awaiting approval. The Approver can access the Request Form to approve in multiple ways:
 - Menu Navigation: Sourcing > Approvals > Sourcing Events To Approve



• Action Items (Flag Icon in Top Right of Screen): Click on the Flag and Click on the Item to Approve

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Action Items								
My Assigned Approvals								
Sourcing Event Approvals								

• Quick Links (Widget in Sourcing Dashboard): My Sourcing Events to Approve

Quick Links	0
Create New Event	1
Request Sourcing Event	
My Sourcing Events to Approve	
My Sourcing Events to Evaluate	
Search Events	
View Saved Searches	



2. The Designated Approver clicks on the Event Number to Open it for Review and Approval.

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Approvals				Œ	Submit Date/Tim	e Newest First 🔻
Requisitions Purchase Order Change Re	equests Sourcing Events Evaluation	Sourcing Events 1	Procurement Requests	Sourcing Event Requests		
Your Selections ⊣←	Total Results 1 Display 20 per folder 🔹					
Date Range	MY SOURCING EVENT APPROVALS 1					~
All Dates 🗸	EVENT NUMBER	EVENT TITLE	ASSIGNED APPROVER	SUBMITTED DATE/TIME	SUBMITTED BY	
View Approvals For My Approvals 🗸	RFP-730-UOH1-3269-2024	AT TEST 23/08	Abhishek Thilakan	8/23/2024 9:02 AM	Abhishek Thilakan	Approve
Filters	Event Type RFP Open Date/Time 8/22/2024	12:00 AM CDT	Folders 0	Days in folder [My Sourcing Even	t Approvals]	

- 3. After reviewing the event, the Approver clicks on the Workflow Actions button and selects one of the following:
 - Approve (select to Approve request)
 - Assign to Myself (select to return it to the Requester. Note: other menu options become available if you assign it to yourself)

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Sourcing Approvals Sourcing Events To Ap	pprove							
Back to Approvals	1 of 1 Results 🔻 😮 Fo	Ider: My Sourcing Event Approvals						
This event is Pending Approval . It must	t be approved before it can be o	pened as scheduled on 8/22/2024 12:00 AM CDT.			Workf	flow Actions 🔻		
AT TEST 23/08	Setup				Eve For	prove		
Type: Request for Proposal (G&S)	Event Title *	AT TEST 23/08			Pul	t on Hold ject		
Event Status: Pending	Event Type 😧	Request for Proposal (G&S)			Ret	turn to Draft		
Settings and Content 🖤	Work Group	UofH			Ret	turn to Shared Folder		
Setup 🗸	Event Number *	RFP-730-UOH1-3269-2024			Ad	d Ad-Hoc Step		
Users 🗸	Stage Title							
Description 🗸	. Did Information							
Prerequisites 18	✓ Bid Information							
Buyer Attachments 5	Business Unit *	UH-730 🗸						
Supplier Attachments	Project Manager *	TEST						
Questions 19	Please select the Type of	Goods and Services Between \$1M and \$5M ↓						
Items 1	Form *							
Suppliers 1	Who is the incumbent vendor, if applicable?							
Tools »	When does the current							
	applicable?							
	Estimated Contract Start							
	★ Required			Save Pr	ogress	Next >		



4. The Approver also has the option to add an Ad-hoc approval step, if required. To do this, click on Add Ad-Hoc Step under Workflow Actions.

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Sourcing Approvals Sourcing Events To Approve										
C Back to Approvals 1 of 1 Results ▼ < > Folder: My Sourcing Event Approvals										
This event is Pending Approval . It must	be approved before it can be op	ened as scheduled on 8/22/2024 12:00 AM CDT.			Workfle	ow Actions 🔻				
AT TEST 23/08 RFP-730-U0H1-3269-2024	Setup				Eve For	rove ward To				
Type: Request for Proposal	Event Title *	AT TEST 23/08			Put	on Hold				
Event Status: Pending	Event Type 😢	Request for Proposal (G&S)			Ret	urn to Draft				
Settings and Content 🖤	Work Group	UofH			Ret	urn to Shared Folder				
Setup 🗸	Event Number *	RFP-730-U0H1-3269-2024			Add	Ad-Hoc Step				
Users 🗸	Stage Title									
Description 🗸										
Prerequisites 18	✓ Bid Information									
Buyer Attachments 5	Business Unit *	UH-730 ~								
Supplier Attachments 🗸	Project Manager *	TEST								
Questions 19	Please select the Type of	Goods and Services Between \$1M and \$5M ✓								
Items 1	Form *									
Suppliers 1	Who is the incumbent vendor, if applicable?									
Tools >>	When does the current contract expire, if applicable?									
	Estimated Contract Start	m								
	★ Required			Save Pro	ogress	Next >				

5. You can set the position of the ad-hoc step, name the step, and assign one or more approvers. Click *Save* to finalize these settings.

Add Ad-Hoc Step						
After	Initial Program Manager Review 🗸					
Step Name *	Ad-hoc 1					
Ad-Hoc Approvers *	Inman, Monte ×					
Comments						
	1000 characters remaining					
* Required	Save Close					



6. To confirm the addition of the new ad-hoc step, navigate to the Approvals Tab under Tools. The new step will be displayed there.

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Sourcing Approvals Sourcing Events To Approvals	prove					
Gack to Approvals 1 of 1 Results I of 1 Results Folder: My Sourcing Event Approvals						
This event is Pending Approval. It must	be approved before it can be opened as scheduled on 8/22/2024 12:00 AM CDT.		Workflow A	ctions 🔻		
AT TEST 23/08 RFP-730-UOH1-3269-2024	Approvals					
Type: Request for Proposal (G&S) Event Status: Pending Settings and Content > Tools > Internal Notes Exports and Imports Q & A Board Approvals	Sourcing Event Approval Workflow Sourcing Event Evaluation Workflow Show skipped steps Orientation Horizontal Event Submitted Notification Sent Horizontal Initial Program Manager Review Ad-hor Future Ad-hor Future View appr	⇒1 → overs	Risk Management Review Future -+ View approvers Expedite	OCA Review Future → View approvers Expedite	Final Progra fi Vie	
Award Notifications						