

SAP Ariba

PROCUREMENT SERVICES DIVISION



End-USER Training

P2P Core

How to Create SBE Tracking
'D-Form' in Ariba Contract
Workspace

**(After or During Contract
Workspace Publishing)**

The purpose of this job aid is to show the process of updating a Contract Workspace to track the participation and contract spend for SBE Certified vendors. This is also known as a “D-Form”.

This process follows the creation of a Contract Workspace in Ariba.

For additional resources on Contract Workspace creation, find the following links below:

SIM Video- [Purchasing Training: How to Create a Contract Workspace](#)

Job Aid- [Purchasing Training: How to Create a Contract Workspace](#)

Additional resources can be found on Procurement’s Ariba webpage:

<https://www.lausd.org/Page/19812>

1

Open your Contract Workspace, then select the **'Documents'** tab.

Test Contract HC 03.04 ID CW14179
Tasks: Incomplete Tasks: 0

Contract Workspace (Procurement)

Overview **Documents** Tasks Team Message Board History

Overview Actions ▾ Process All Tasks

Contract ID: CW14179 ▶▶ Phase 1 - Prepare and Draft ▾
Contract Status: Draft ⇒ Phase 2 - Negotiate and Approve ▾
Version: Original ⇒ Phase 3 - Execute ▾
⇒ Phase 4 - Finalize and Publish ▾

2

From the **'Documents'** tab, click **'Actions'**

Test Contract HC 03.04 ID CW14179
Tasks: Incomplete Tasks: 0

Contract Workspace (Procurement)

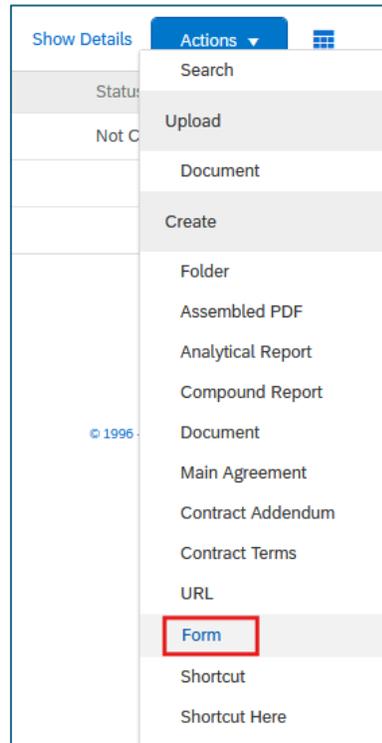
Overview **Documents** Tasks Team Message Board History

Test Contract HC 03.04 Show Details **Actions** ▾

Name	Owner	Status
Contract Terms ▾	Project Owner	Not Created
Contract Documents ▾	Project Owner	
Other Documents ▾	Project Owner	

3

From the 'Actions' menu, select "**Form**"



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Select the radio button to the left of 'SBE Utilization Data' and then click either 'Create' button.

A screenshot of a 'Create Form' dialog box. At the top right, there are 'Create' and 'Cancel' buttons, with the 'Create' button highlighted by a red box. Below the title bar, there is a horizontal line and the text 'Select the Form type you want to create and click **Create**.' followed by another horizontal line. Below that, the text 'Select the type of Form you want to create.' is followed by two radio button options: 'SBE Utilization Data' (which has a selected radio button highlighted by a red box) and 'Lessons Learned'. At the bottom right, there are 'Create' and 'Cancel' buttons, with the 'Create' button highlighted by a red box.

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In the '**Title**' field add a title for this D-Form entry. Add additional details in the free-text '**Description**' field.

Create New Form Document OK Cancel

Fill in the information for this Form Document below. When you have fully specified the document, click **OK** to create it.

Test Contract HC 03.04 / New SBE Utilization Data

Title: ⓘ

Description: ⓘ

Base Language:

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The '**Base Language**' should remain as English.

The '**Is Publish Required**' radio selection should remain as '**No**' to ensure availability of reporting features.

The '**Test Form**' radio selection should always remain selected as '**No**'.

Base Language:

Is Publish Required: Yes No

Test Form: * Yes No ⓘ

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The Supplier will default from the Contract Workspace. Update the radio selections for the certifications which are applicable for the Supplier.

Please fill in the Form below

Supplier: *	<input type="text" value="EMPIRE STEEL ERECTORS"/> <input type="button" value="Add more"/>	Contract Amount:	\$100,000.00 USD
SBE Certified? *	<input type="radio"/> Yes <input type="radio"/> No	SBE Contract Amount:	\$0.00 USD
SBE Utilization %: *	0%	MIC Contract Amount:	\$0.00 USD
MIC Certified? *	<input type="radio"/> Yes <input type="radio"/> No	VBE Contract Amount:	\$0.00 USD
MIC Utilization %: *	0%		
VBE Certified? *	<input type="radio"/> Yes <input type="radio"/> No		
VBE Utilization %: *	0%		

8

For this Example, we'll say that our test supplier is SBE Certified only. So I'll update the radio selection next to '**SBE Certified?**' to '**Yes**'. For all other certifications, select '**No**'

Please fill in the Form below

Supplier: *	<input type="text" value="EMPIRE STEEL ERECTORS"/> <input type="button" value="Add more"/>	Contract Amount:	\$100,000.00 USD
SBE Certified? *	<input checked="" type="radio"/> Yes <input type="radio"/> No	SBE Contract Amount:	\$100,000.00 USD
SBE Utilization %: *	100%	MIC Contract Amount:	\$0.00 USD
MIC Certified? *	<input type="radio"/> Yes <input type="radio"/> No	VBE Contract Amount:	\$0.00 USD
MIC Utilization %: *	0%		
VBE Certified? *	<input type="radio"/> Yes <input type="radio"/> No		
VBE Utilization %: *	0%		

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The SBE Utilization % is automatically showing at 100% because our test supplier 'Empire Steel' is the only Supplier for this agreement. The utilization totals will auto-calculate on the right.

Contract Amount:	\$100,000.00 USD
SBE Contract Amount:	\$100,000.00 USD
MIC Contract Amount:	\$0.00 USD
VBE Contract Amount:	\$0.00 USD

10

If you have sub suppliers or sub contractors who are certified, you can add their details in the '**Sub Supplier Data**' section.

First, click '**Add**'.

Sub Supplier Data							
No. ↑	Sub Supplier *	SBE Certified? *	SBE Utilization % *	MIC Certified? *	MIC Utilization % *	VBE Certified? *	VBE Utilization % *
No items							
Copy	Delete	Add					

11

Search and select the sub supplier by clicking the downward arrow in the Sub Supplier field, then click **'Search more'**.

The screenshot shows a form titled "Sub Supplier Data". At the top, there are several checkboxes and labels: "No. ↑ Sub Supplier *", "SBE Certified? *", "SBE Utilization % *", "MIC Certified? *", "MIC Utilization % *", and "VBE Certified? *". Below these, there is a row with a dropdown menu for "Sub Supplier" currently showing "(no value)". A dropdown menu is open, listing "2SIGMA SCHOOL INC" and "Newfangled Processes". A "Search more" button with a magnifying glass icon is highlighted with a red box. To the left of the dropdown is a "Copy" button. At the bottom of the form, there is a checkbox labeled "Announce the creation of this new document." with an information icon.

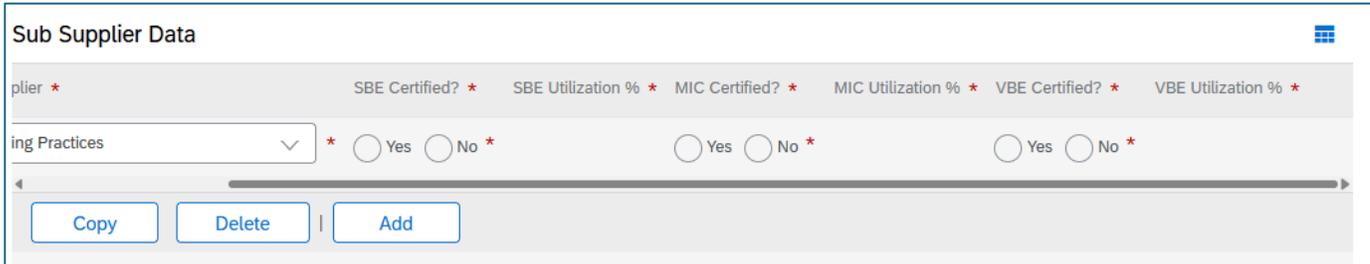
12

Search for the supplier with the text field and then click **'Search'**. You can click the supplier name in blue to review additional details and confirm they are the correct supplier. Then, click **'Select'**. Once you've selected the Sub Supplier, click **'Done'**.

The screenshot shows a form titled "Choose Value for Sub Supplier". At the top, there is a search bar with the text "Organization Name" and the value "appealing". A blue "Search" button is to the right of the search bar. Below the search bar, there is a list of results under the heading "Organization Name ↑". The first result is "Appealing Practices" in blue text. A blue "Select" button is to the right of "Appealing Practices". At the bottom of the form, there is a blue "Done" button.

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Use the arrows to scroll to the right and review all of the available certification selections.



The screenshot shows a form titled "Sub Supplier Data" with a table of certification options. The table has columns for "SBE Certified?", "SBE Utilization %", "MIC Certified?", "MIC Utilization %", "VBE Certified?", and "VBE Utilization %". Each column has a radio button for "Yes" and "No". The "MIC Certified?" column has a radio button for "Yes" that is selected. Below the table are three buttons: "Copy", "Delete", and "Add".

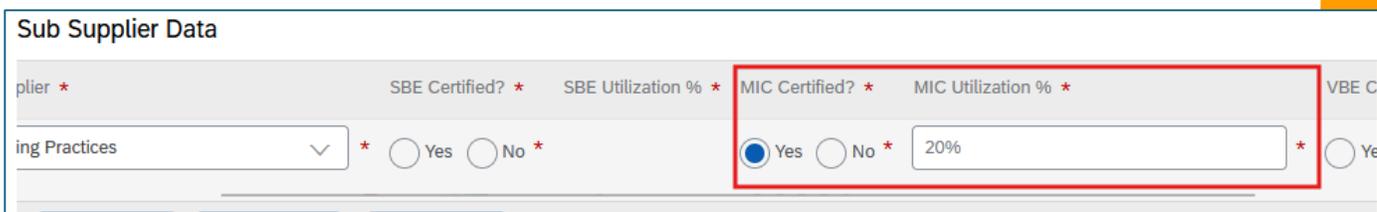
14

In this example, we'll say our Sub Supplier is Micro certified and will be completing 20% of the work for this agreement.

First, click **'Yes'** on the radio button for **'MIC Certified?'**

Then, in the **'MIC Utilization %'** field, enter **'20'**

Select **'No'** for all other certification radio buttons which do not apply to the Sub Supplier.



The screenshot shows the same "Sub Supplier Data" form as in the previous image. The "MIC Certified?" and "MIC Utilization %" columns are highlighted with a red box. The "MIC Certified?" radio button for "Yes" is selected, and the "MIC Utilization %" field contains the value "20%".

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The MIC Contract Amount will automatically update on the right after you make your Sub Supplier updates. This area also calculates the total utilization % of sub suppliers on the left.

Supplier: * <input type="text" value="EMPIRE STEEL ERECTORS"/> <input type="button" value="Add more"/>	Contract Amount: \$100,000.00 USD
SBE Certified? * <input checked="" type="radio"/> Yes <input type="radio"/> No	SBE Contract Amount: \$100,000.00 USD
SBE Utilization %: * 100%	MIC Contract Amount: \$20,000.00 USD
MIC Certified? * <input type="radio"/> Yes <input checked="" type="radio"/> No	VBE Contract Amount: \$0.00 USD
MIC Utilization %: * 20%	
VBE Certified? * <input type="radio"/> Yes <input checked="" type="radio"/> No	
VBE Utilization %: * 0%	

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Repeat these steps for any additional Sub Suppliers, and when complete click **'OK'**

E Utilization % *	MIC Certified? *	MIC Utilization % *	VBE Certified? *
<input checked="" type="radio"/> Yes <input type="radio"/> No *	<input type="text" value="20%"/> *	<input type="radio"/> Yes <input type="radio"/> No *	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Review your entries for accuracy, if you are not ready to publish, you can click 'Save' to update your progress and save the form as a draft.

SBE Utilization for Test Project

Save
Cancel
Publish

Edit form details below.

Save these changes as a new version? Yes, save as v1 No, save and continue editing v0

Supplier: * Add more

SBE Certified? * Yes No

SBE Utilization %: * 100%

MIC Certified? * Yes No

MIC Utilization %: * 20%

VBE Certified? * Yes No

VBE Utilization %: * 0%

Contract Amount: \$100,000.00 USD

SBE Contract Amount: \$100,000.00 USD

MIC Contract Amount: \$20,000.00 USD

VBE Contract Amount: \$0.00 USD

Sub Supplier Data

No.	Sub Supplier *	SBE Certified? *	SBE Utilization % *	MIC Certified? *	MIC Utilization % *
1	Appealing Practices	<input type="radio"/> Yes <input checked="" type="radio"/> No *		<input checked="" type="radio"/> Yes <input type="radio"/> No *	20%

Copy
Delete
Add

To finalize the form, click '**Publish**'. The status of the form will now reflect as 'Published'

Test Contract HC 03.04			Show Details	Actions ▼
Name	Owner	Status		
SBE Utilization for Test Project ▼	BUYER04	Published		

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To Edit an existing form, navigate to the Contract Workspace. Then, select the **'Documents'** tab.

Test Contract HC 03.04 ID CW14179
Tasks: Incomplete Tasks: 0

Contract Workspace (Procurement)

Overview **Documents** Tasks Team Message Board History

Test Contract HC 03.04 Show Details Actions ▾

Name	Owner	Status
 SBE Utilization for Test Project ▾	BUYER04	Published
 Contract Terms ▾	Project Owner	Not Created

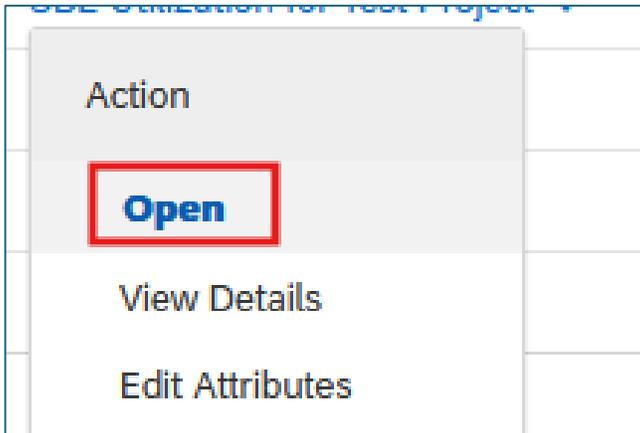
20

Click the downward arrow next to the title of the published SBE Utilization form.

Name	Owner	Status
 SBE Utilization for Test Project ▾	BUYER04	Published
 Contract Terms ▾	Project Owner	Not Created

21

From the Action menu that opens, select **'Open'**.



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At the top of the page, select whether you would like to make edits to the same version of the form or if you would like to save and publish the changes as a version 2 (v2).

Edit form details below.

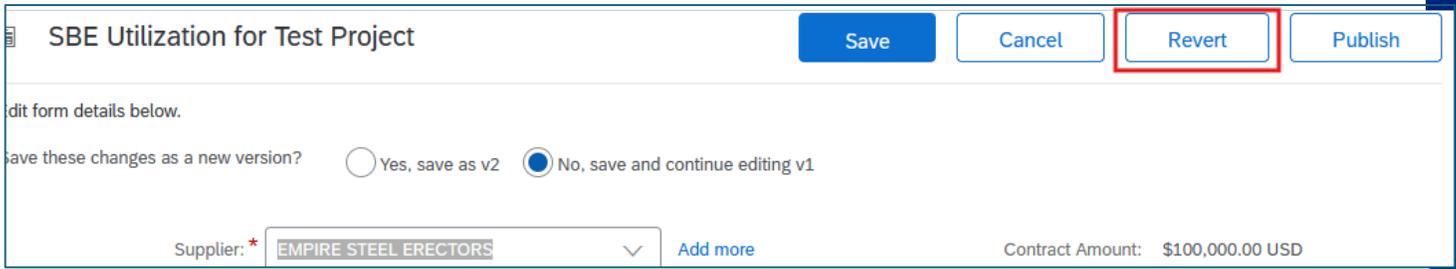
Save these changes as a new version?

Yes, save as v2

No, save and continue editing v1

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Scroll down and make updates and edits as needed. To remove changes and return the selections to the previous version click **'Revert'**.



SBE Utilization for Test Project

Save Cancel **Revert** Publish

edit form details below.

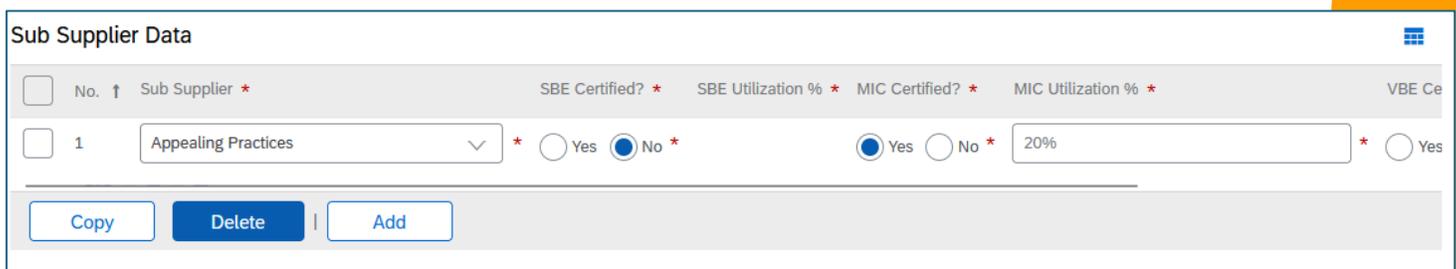
save these changes as a new version? Yes, save as v2 No, save and continue editing v1

Supplier: * EMPIRE STEEL ERECTORS Add more Contract Amount: \$100,000.00 USD

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On some occasions you may need to add, remove, or replace one of your sub suppliers. To do so, open the D-Form and scroll down to the entry for the sub supplier you need to remove.

In this example, we'll say that Appealing Practices is being replaced as a sub supplier by Newfangled Practices who VBE certified.



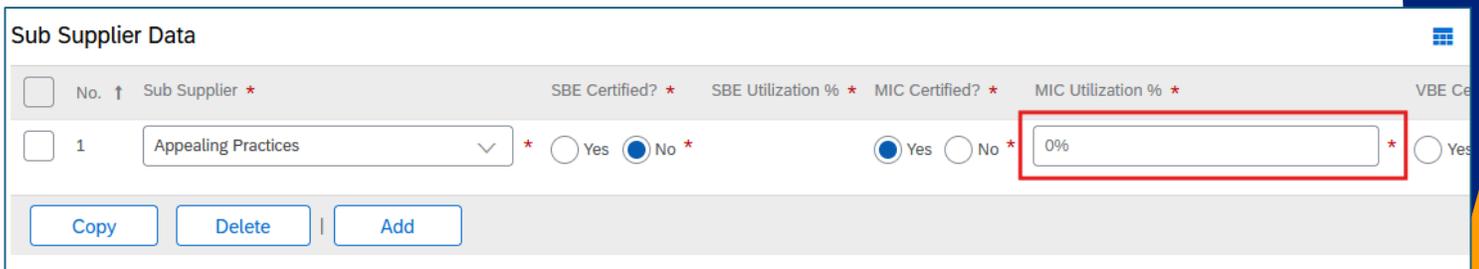
No. ↑	Sub Supplier *	SBE Certified? *	SBE Utilization % *	MIC Certified? *	MIC Utilization % *	VBE Ce
1	Appealing Practices	<input type="radio"/> Yes <input checked="" type="radio"/> No *	<input checked="" type="radio"/> Yes <input type="radio"/> No *	20%	<input type="radio"/> Yes	

Copy Delete Add

25

We will leave the entry for Appealing Practices to have a historical record of them being a sub supplier for this contract. However, we will edit and remove their utilization % so it isn't falsely reported on the contract.

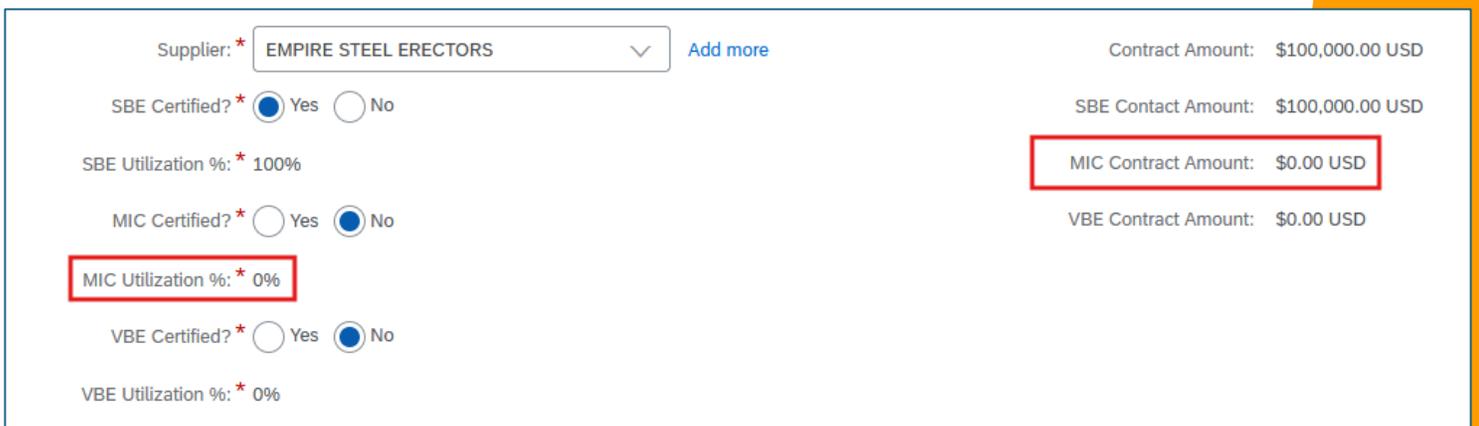
To do so, update the % Utilization field to '0'



The screenshot shows a table titled "Sub Supplier Data". The table has columns for "No.", "Sub Supplier", "SBE Certified?", "SBE Utilization %", "MIC Certified?", "MIC Utilization %", and "VBE Ce". The first row is selected, showing "1" in the "No." column, "Appealing Practices" in the "Sub Supplier" column, "No" selected for "SBE Certified?", "No" selected for "MIC Certified?", and "0%" in the "MIC Utilization %" column. The "MIC Utilization %" field is highlighted with a red box. Below the table are buttons for "Copy", "Delete", and "Add".

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This will also update the MIC Contract Amount and Utilization % at the top of the form.



The screenshot shows a form with various fields. On the left, there is a "Supplier:" dropdown menu with "EMPIRE STEEL ERECTORS" selected. Below it are radio buttons for "SBE Certified?" (Yes selected), "SBE Utilization %:" (100%), "MIC Certified?" (No selected), "MIC Utilization %:" (0%), "VBE Certified?" (No selected), and "VBE Utilization %:" (0%). On the right, there are contract amount fields: "Contract Amount: \$100,000.00 USD", "SBE Contract Amount: \$100,000.00 USD", "MIC Contract Amount: \$0.00 USD" (highlighted with a red box), and "VBE Contract Amount: \$0.00 USD".

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To add the new sub supplier, click the **'Add'** button in the **'Sub Supplier Data'** section.

The screenshot shows the 'Sub Supplier Data' section. It features a table with the following columns: 'No.', 'Sub Supplier', 'SBE Certified?', and 'SBE Utiliz'. The first row has the number '1' in the 'No.' column, 'Appealing Practices' in the 'Sub Supplier' column, and radio buttons for 'Yes' and 'No' in the 'SBE Certified?' column, with 'No' selected. Below the table, there are three buttons: 'Copy', 'Delete', and 'Add'. The 'Add' button is highlighted with a red rectangular border.

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In the new field that opens, click the downward arrow in the **'Sub Supplier'** field and search/select the new sub supplier.

The screenshot shows the 'Sub Supplier Data' section with a dropdown menu open for the 'Sub Supplier' field. The dropdown menu lists the following options: '2SIGMA SCHOOL INC', 'Newfangled Processes', and 'Appealing Practices'. The 'Newfangled Processes' option is highlighted with a red rectangular border. Below the dropdown menu, there is a 'Search more' link. The 'Copy' button is also visible on the left side of the table.

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Select the appropriate **'yes'** and **'no'** responses for the utilizations and then add the associated % utilization for any applicable certification. The % utilizations and amounts will automatically update at the top of the form.

The screenshot shows a form titled "Sub Supplier Data" with the following fields and values:

Sub Supplier *	SBE Certified? *	SBE Utilization % *	MIC Certified? *	MIC Utilization % *	VBE Certified? *	VBE Utilization % *
Appealing Practices	<input type="radio"/> Yes <input checked="" type="radio"/> No		<input checked="" type="radio"/> Yes <input type="radio"/> No	0%	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Newfangled Processes	<input type="radio"/> Yes <input checked="" type="radio"/> No		<input type="radio"/> Yes <input checked="" type="radio"/> No		<input checked="" type="radio"/> Yes <input type="radio"/> No	20%

30

When you have finished making changes, you can click **'Save'** to save your changes or you can click **'Publish'** to create a v2 of the form or make changes to the original form based on your change settings.

The screenshot shows the bottom section of a form titled "SBE Utilization for Test Project". It features four buttons: "Save", "Cancel", "Revert", and "Publish". The "Save" and "Publish" buttons are highlighted with red boxes. Below the buttons, there is a section for editing form details:

Edit form details below.

Save these changes as a new version? Yes, save as v2 No, save and continue editing v1