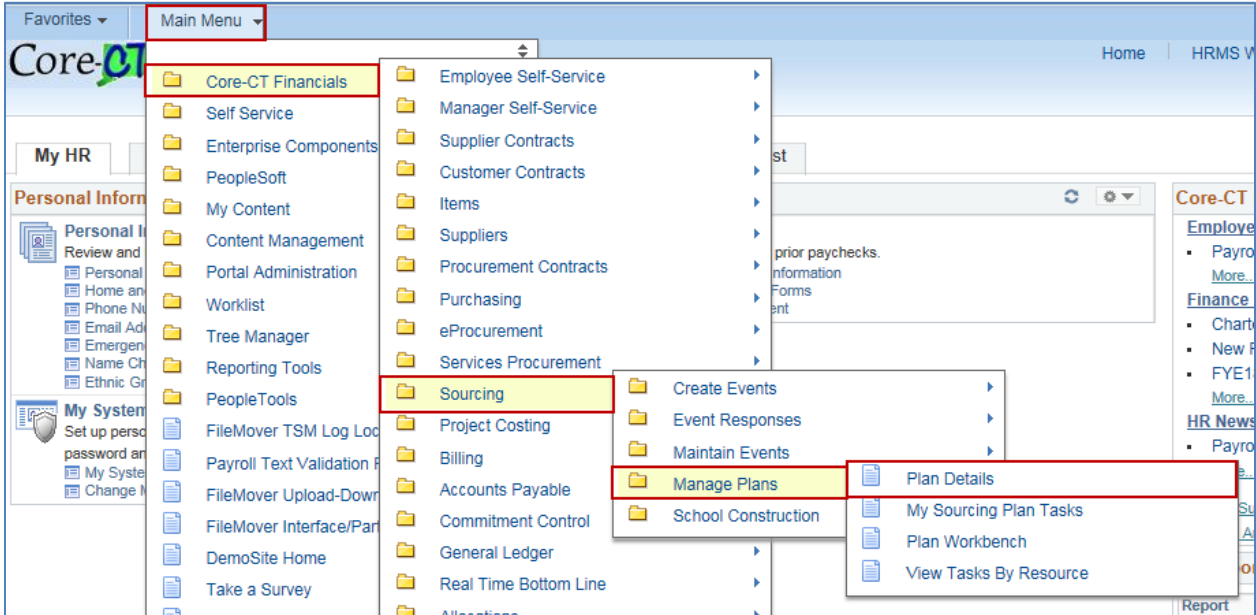


## Creating a Sourcing Plan

The Sourcing Plan will be used as a tool to maintain the School District project review schedule. The Sourcing Plan contains the tasks associated with the project, and can link to historical plans.

**Navigation:** *Main Menu > Core-CT Financials > Sourcing > Manage Plan > Plan Details*



1. Under the **Create a New Plan** tab enter:

- **Business Unit** – DASM1
- **Plan ID** - NEXT
- **Plan Type** – Sourcing Plan

2. Click **Add**.

**Plan Details**

---

Business Unit

Plan ID

Plan Type

3. Enter the following information on the Strategic Sourcing Project Plan page:

- **Plan Name**
- **Description**
- **Plan Owner** – defaults to current user, but can be updated by clicking the magnifying glass
- **Primary Category** – 72000000

Strategic Sourcing Project Plan

Business Unit DASM1 Plan ID NEXT Version 1 Status New

### Define Sourcing Plan Basics

Enter overall sourcing plan details. When done, proceed to the next step.

Copy From: Sourcing Plan

\*Plan Name:

Description:

Start Date: 09/17/2018 End Date:

Overall Status: On Track

Primary Category:  Secondary Category:

Current Phase:

Baseline Spend:  USD Final Spend:  USD

\*Plan Owner:  Last Updated By:

Current Owner:  Last Update Date/Time:

**Related Details**

**Historical Plans** Personalize | Find |   First 1 of 1 Last

Please select an historical plan.

4. To copy tasks from a previous Sourcing Plan, click **Continue**.

Strategic Sourcing Project Plan

Business Unit DASM1 Plan ID NEXT Version 1 Status New

### Define Sourcing Plan Basics

Enter overall sourcing plan details. When done, proceed to the next step.

Copy From: Sourcing Plan

\*Plan Name:

Description:

5. Enter the **Copy Options** and **Copy Methods**. Enter any Search Criteria, as needed, and click **Search**.

6. Click **Select Tasks**.

Sourcing Plan Summary

### Copy From Details

Copy Options

Copy From: Sourcing Plan

\*Copy Options: Copy Only Selected Tasks

\*Copy Method: Override

Search Criteria

Plan ID:  Plan Name:

Category:  Plan Owner:

Search Results

Plan Templates Personalize | Find | View All First 1-10 of 36 Last

Plan ID	Plan Name	Select Tasks
064-0303	241-0105 CREC Aerospace Academy	<input type="button" value="Select Tasks"/>
SCP0000000	TEST	<input type="button" value="Select Tasks"/>
SCP0000001	Test	<input type="button" value="Select Tasks"/>
SCP0000002	Test	<input type="button" value="Select Tasks"/>
SCP0000003	UAT Plan Zaire	<input type="button" value="Select Tasks"/>

7. Check the box next to the tasks you wish to copy, and click **Copy Tasks**.

Copy From Task Select page

Plan ID 064-0303      Plan Name 241-0105 CREC Aerospace Academy

Select All       Clear All

**Tasks**      Personalize | Find | View All |      First 1-7 of 7 Last

Task ID	Task Name
<input type="checkbox"/> 1	Overall Project
<input checked="" type="checkbox"/> 2	Concept Review
<input checked="" type="checkbox"/> 2.1	8/15 obtain correct documents
<input checked="" type="checkbox"/> 2.2	8/20 obtain correct documents
<input checked="" type="checkbox"/> 3	Prep Mtg
<input checked="" type="checkbox"/> 4	FF&E Review
<input checked="" type="checkbox"/> 5	Playground Review

[Return to Copy From Details](#)

[Return to Plan Summary](#)

8. To create and assign additional tasks, click Enter Plan Details hyperlink.

Strategic Sourcing Project Plan

Business Unit DASM1 Plan ID NEXT Version 1 Status New

### Define Sourcing Plan Basics

Enter overall sourcing plan details. When done, proceed to the next step.

Copy From

\*Plan Name

Description

Start Date  Primary Category

End Date  Secondary Category

Overall Status:  Baseline Spend

Current Phase:  Final Spend

\*Plan Owner:  Last Updated By:

Current Owner:  Last Update Date/Time:

**Related Details**

**Historical Plans** Personalize | Find |   First 1 of 1 Last

Please select an historical plan.

[Enter Plan Details >>](#)



- 9. Enter a Start Date, and the associated tasks. Each task will need a start and end date. The tasks can be assigned, if needed. Tasks will be monitored in the Task Status column.
- 10. Click **Save Plan** when complete.
- 11. Click the Return to Plan Summary link.

Task ID	Task Name	Duration (Days)	Start Date	End Date	Assigned To	Task Status	Completed Requirements
1	Concept Review	1.00	09/25/2018	09/25/2018	DAS-Thompson Kermit D	Not Started	
2	8/15 obtain correct documents	1.00	09/25/2018	09/25/2018	DAS-Thompson Kermit D	Not Started	None
3	8/20 obtain correct documents	1.00	09/25/2018	09/25/2018	DAS-Thompson Kermit D	Not Started	None
4	Prep Mtg	1.00	09/25/2018	09/25/2018	DAS-Thompson Kermit D	Not Started	None
5	FF&E Review	1.00	09/25/2018	09/25/2018	DAS-Fabiani, Barbara A.	Not Started	None
6	Playground Review	1.00	09/25/2018	09/25/2018	DAS-Fabiani, Barbara A.	Not Started	None

- 12. To upload previous plans, click **Select** in the Historical Plans section.

Strategic Sourcing Project Plan  
Business Unit DASM1 Plan ID NEXT Version 1 Status New

### Define Sourcing Plan Basics

Enter overall sourcing plan details. When done, proceed to the next step.

Copy From: Sourcing Plan

\*Plan Name: Bob Celmer

Description: West Haven High School

Start Date: 09/25/2018 End Date: 09/25/2018 Primary Category: 72000000

Overall Status: On Track Secondary Category: Baseline Spend: USD Final Spend: USD

Current Phase: \*Plan Owner: Accenture-Laura Zucker Last Updated By: Current Owner: Last Update Date/Time

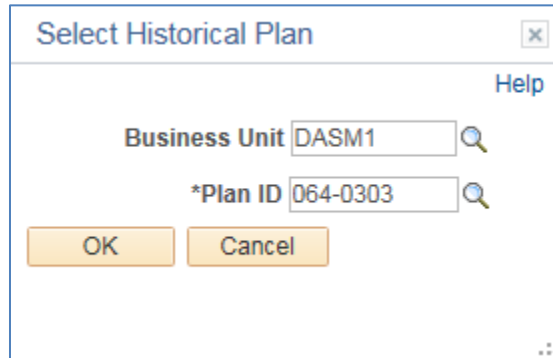
**Related Details**

**Historical Plans** Personalize | Find | First 1 of 1 Last

Please select an historical plan.

Enter Plan Details >>

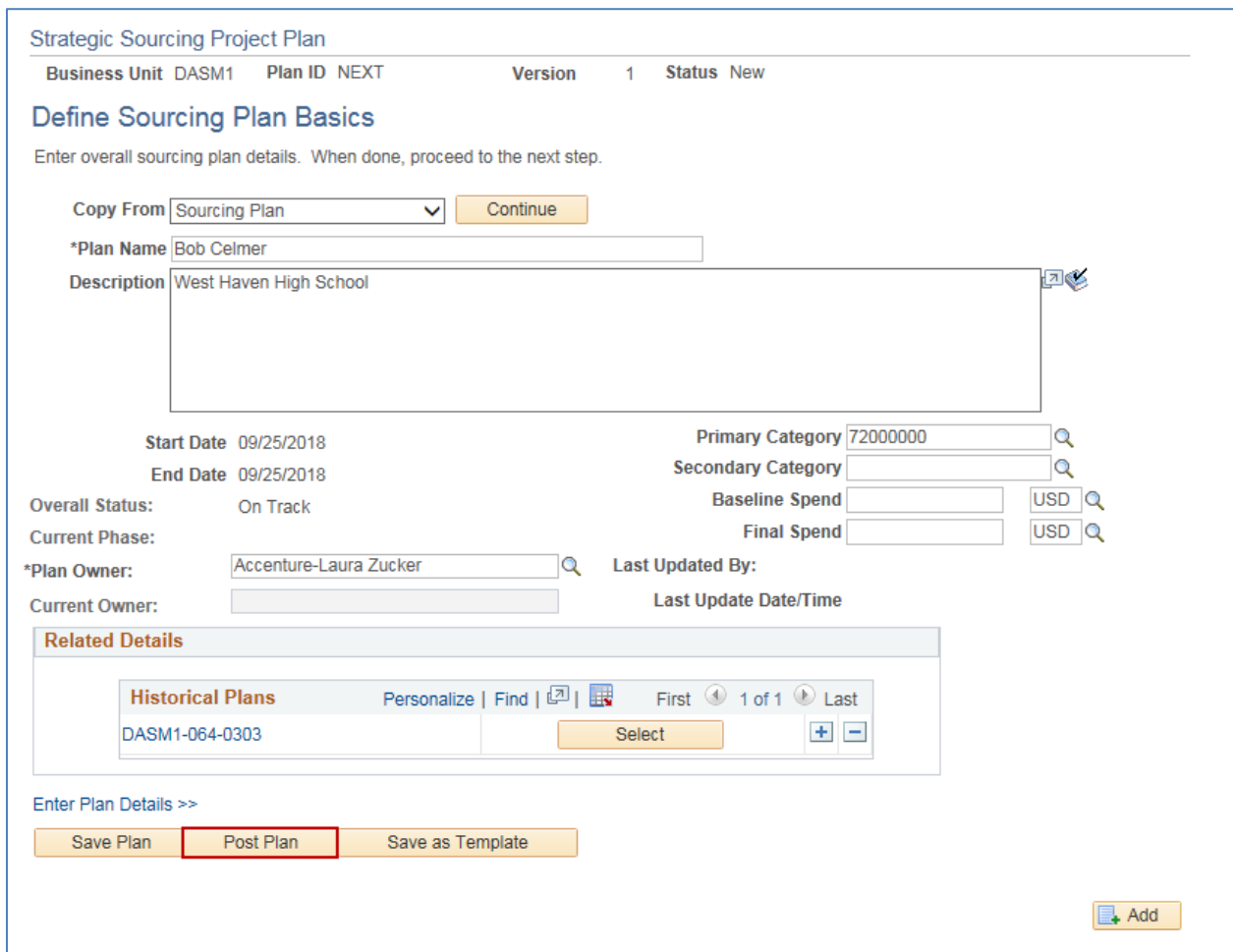
13. In the pop up box, enter the **Business Unit** DASM1 and the **Plan ID**.



The dialog box titled "Select Historical Plan" contains the following fields and controls:

- Business Unit:** Text input field containing "DASM1" with a search icon.
- \*Plan ID:** Text input field containing "064-0303" with a search icon.
- Buttons:** "OK" and "Cancel" buttons.
- Help:** A "Help" link in the top right corner.

14. Click **Post Plan** to create and post the Sourcing Plan.



The main form is titled "Strategic Sourcing Project Plan" and includes the following sections and fields:

- Summary:** Business Unit: DASM1, Plan ID: NEXT, Version: 1, Status: New.
- Define Sourcing Plan Basics:**
  - Copy From: Sourcing Plan (dropdown), Continue button.
  - \*Plan Name: Bob Celmer (text input).
  - Description: West Haven High School (text area).
  - Start Date: 09/25/2018, End Date: 09/25/2018.
  - Overall Status: On Track.
  - Primary Category: 72000000 (dropdown), Secondary Category: (dropdown).
  - Baseline Spend: (input), USD (dropdown).
  - Final Spend: (input), USD (dropdown).
  - \*Plan Owner: Accenture-Laura Zucker (dropdown), Last Updated By: (input).
  - Current Owner: (input), Last Update Date/Time: (input).
- Related Details:**
  - Historical Plans table with columns: Personalize, Find, First, 1 of 1, Last.
  - Table content: DASM1-064-0303, Select button, +, - buttons.
- Buttons:** Save Plan, Post Plan (highlighted with a red border), Save as Template.
- Footer:** Add button.