Basics of Ariba

PROCUREMENT SERVICES
WEBCAST TRAINING SERIES-9/22/2020

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What is Ariba?

ARIBA is the University's electronic procurement system to manage all ordering, purchasing, receiving, invoicing, sourcing, payments and reporting with a single point of entry.
How do I start?

• Anyone with a UW Net ID can access the Ariba system to begin most types of transactions (exception: Non-PO Invoice).

• Know Your Approvers: All transactions will need established approvers based on either the budget or organization code to approve them. These approvers are set up in ASTRA, by a designated individual in the department.

• If you need to be set up as an approver, the Authorizer in your department can set that up.

• To start working in Ariba, find the login button the PS homepage.
Ariba Roles:

Preparer: Anyone with UW Net ID who starts a transaction

Budget/Org Approver: Required for orders, set up in ASTRA by department

Funding Approver: Required for payment mechanisms, set up in ASTRA by department

Watcher: Set up in ASTRA by department, optional

Compliance Approver: Set up in ASTRA by department, optional

Ad Hoc Approver: Individual added manually to the approval flow by the department, optional
Types of Transactions:

Catalog Purchase Order:
- An order placed in Ariba based on a purchase from a catalog. The preferred resource for campus to shop. Starts with a requisition request that becomes a purchase order.

Non-Catalog Purchase Order:
- An order placed in Ariba and sent to supplier, based on an approved requisition request.
Blanket Purchase Order:

- A order placed in Ariba sent to a supplier, typically used for standing orders and subawards, based on an approved contract request.

Non-PO Invoice:

- Payment tool, used to pay small dollar invoices to suppliers.

Travel Expense Report:

- Payment tool, for travel reimbursement.

eReimbursement:

- Payment tool, for non-travel reimbursement.
Payment to Individual:
• Payment tool, used to pay for individual services

Card Application:
• ProCard request form

Card Limit Increase:
• ProCard increase request form

Contract Review:
• Request form to have a contract or agreement reviewed by Purchasing
## Transaction ID Prefixes

<table>
<thead>
<tr>
<th>Category</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blanket PO (BPO)</td>
<td>EI12345</td>
</tr>
<tr>
<td>Purchase Order (EI)</td>
<td>EI12345</td>
</tr>
<tr>
<td>Contact Request (CR)</td>
<td></td>
</tr>
<tr>
<td>Travel Expense Report (ER)</td>
<td></td>
</tr>
<tr>
<td>Payment to Individual (P2I)</td>
<td></td>
</tr>
<tr>
<td>Reimbursement (XR)</td>
<td></td>
</tr>
<tr>
<td>Non-PO or order invoice (INV)</td>
<td></td>
</tr>
<tr>
<td>Card Limit Increase (WLI)</td>
<td></td>
</tr>
<tr>
<td>Card Application (WPC)</td>
<td></td>
</tr>
<tr>
<td>Requisition (S)</td>
<td>BPO67890</td>
</tr>
</tbody>
</table>

Example:
- EI12345
- BPO67890
Process Flow

• All transactions will go through steps and will need a department Approver to approve them.

• Depending on the dollar amount and type of transaction, central office might be required to review and approve the transaction as well.

Example: Non-Catalog Purchase Order

1. The department Preparer creates a requisition ($).
2. The requisition ($) is approved by the department approver.
3. The requisition ($) is approved or denied by Central Office if necessary.
4. A purchase order is generated (E1).
5. The purchase order (E1) is sent to the supplier.
Terms:

**Punchout Catalog:**
A catalog that is based in the supplier’s own website.

**Hosted Catalog:**
A catalog based in Ariba.

**Requisition:**
Starts the process of placing an order: S123-> E1456

**Contract Request:**
Starts the process of creating a BPO:CR123->BPO123
Terms:

Contract:
The term used to refer to Blanket POs in Ariba

Approval Flow:
A tab in a transaction that shows you who must approve a particular transaction

Notifications:
Emails sent to a user who has an action to take on a transaction.

ASTRA:
System used to delegate roles for web based systems like Ariba
Terms:

Delegate:
Give another individual access

ID Number:
Every transaction gets an ID number in Ariba

Invoice:
Electronic eInvoice created in Ariba. May or may not have a PDF attached

Status:
Where the transaction is in the process
Terms:

**Exception:**
A flag on an invoice transaction where the information on the invoice does not match the information on the order.

**Variance:**
A specific type of exception, example: the tax on an invoice is more than expected.

**Payment Loop:**
Where to find payment information for a transaction
Dashboard Features

- Tabs
- Drop down menus
- To-Do Box
- Common Actions Box
- Recently Viewed Box
- My Documents
- Search box
- Column Sorting
Basic Functions

- Finding Catalogs
- Searching
- Preferences
- Approval Flow
- Approve/Deny
- Finding payment loop information
- Viewing Invoices
# Searching in Ariba

<table>
<thead>
<tr>
<th>To Find</th>
<th>Select</th>
<th>Enter In ID Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blanket PO (BPO)</td>
<td>Contract</td>
<td>Number including BPO</td>
</tr>
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<td>Reimbursement</td>
<td>Number including XR</td>
</tr>
<tr>
<td>Non-PO or order invoice (INV)</td>
<td>Invoice</td>
<td>Supplier Invoice number</td>
</tr>
<tr>
<td>Card Limit Increase (WLI)</td>
<td>Card Limit Increase</td>
<td>Number including WLI</td>
</tr>
<tr>
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**Getting Started Section:** [https://finance.uw.edu/ps/resources/training/tutorials](https://finance.uw.edu/ps/resources/training/tutorials)
Resources

Roles and Authorizations:
https://finance.uw.edu/ps/resources/roles

Ariba Webpage:
https://finance.uw.edu/ps/how-to-buy/ariba

Ariba Login:
https://finance.uw.edu/ps/

Online Learning and How to Guides:
https://finance.uw.edu/ps/resources/training/tutorials

Buying Guidance
https://finance.uw.edu/ps/how-to-buy
Questions?
(remember to send to “Everyone”)