

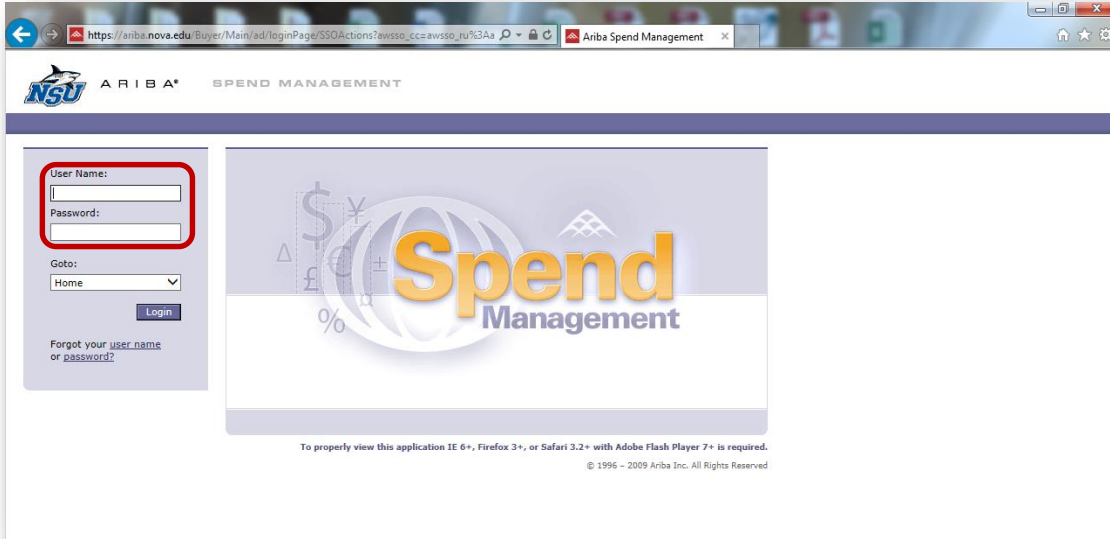
## Ariba 9R1 Training Workbook: Creating a Requisition

This document will review tips for effectively creating Catalog and Non-Catalog Ariba Purchase Requisitions.

- [Back to Top](#)—Return here
- [Logging In](#)—Access and log into Ariba
- [Create a Catalog Requisition](#)—Create a request using an existing supplier catalog
- [Create a Non-Catalog Requisition](#)—Create a request for a supplier without an existing catalog
- [Edit Requisition](#)—Update shipping and accounting information
- [Search for Requisitions](#)—Search for previously entered requisitions
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- [Approvers](#)—Add an approver to a requisition approval flow without editing a document

Log in to Ariba

1. Log into Ariba at <https://ariba.nova.edu> using your email/computer user name and password.



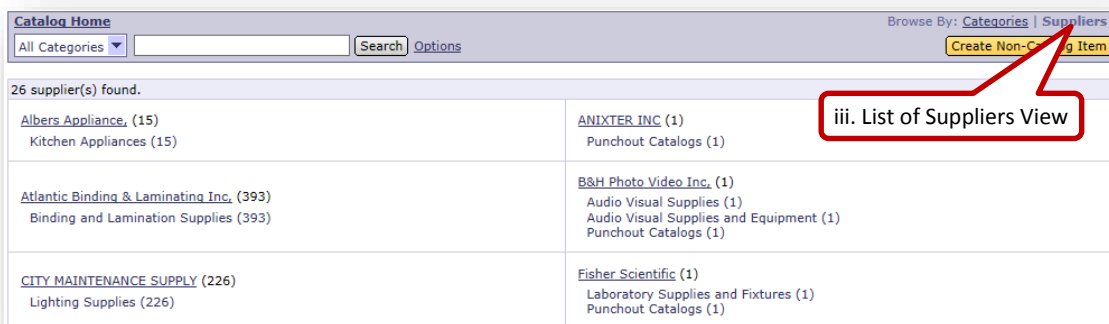
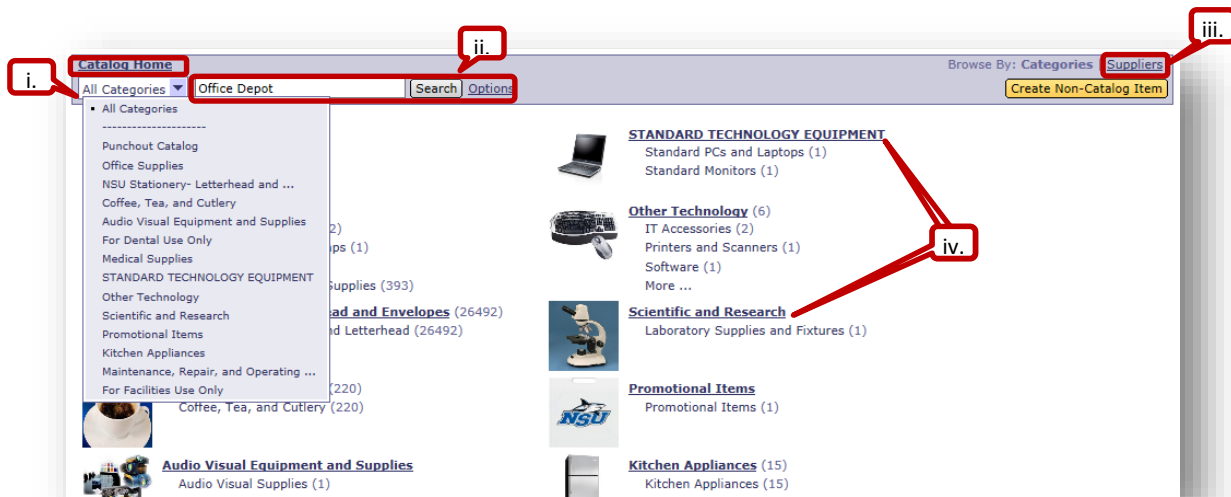
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## Create a Catalog Requisition

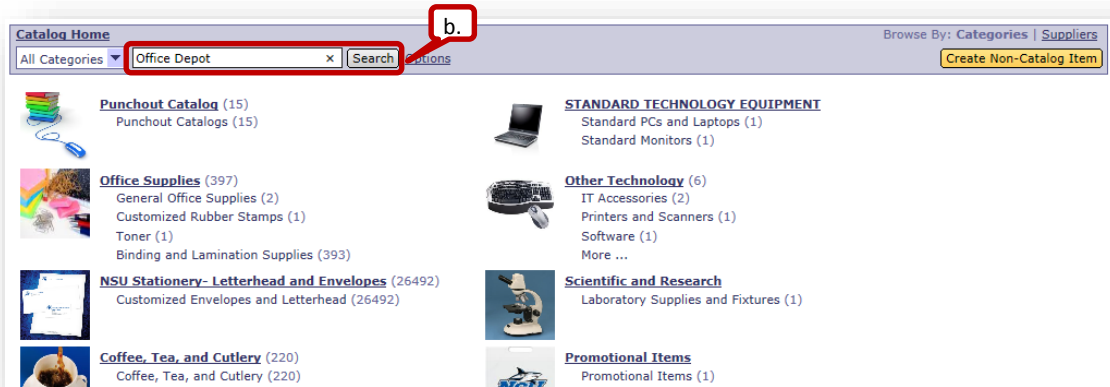
1. Click 'Create' → 'Requisition' at the top of the page, or through Common Actions.



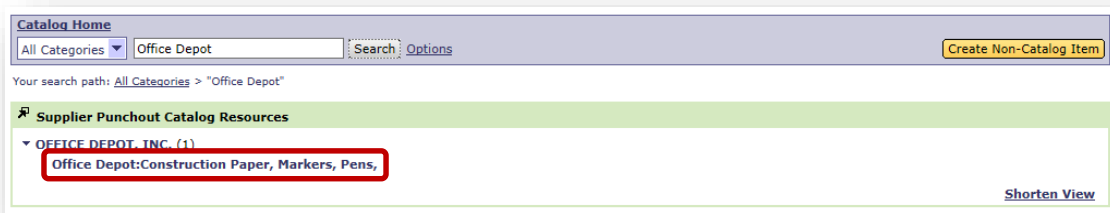
2. Catalog Home page
  - a. Locate the needed catalog one of four ways
    - i. Click on the 'All Categories' drop down
    - ii. Search for the supplier's name in the search box
    - iii. Click on the Suppliers link to view a list of suppliers with catalogs (2<sup>nd</sup> image)
    - iv. Review and select from the categories listed



b. Access the needed catalog. For this example, we will search for 'Office Depot.'

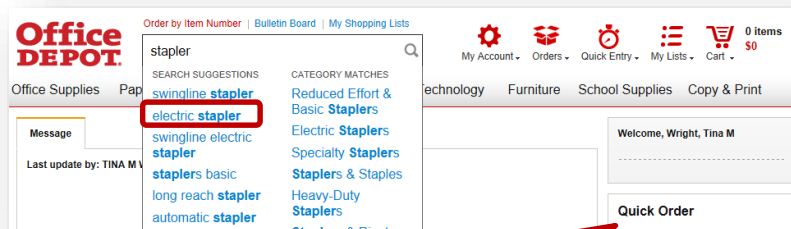


c. Click on the catalog description to access a punchout catalog, e.g., 'Office Depot:Construction Paper, Markers, Pens.'

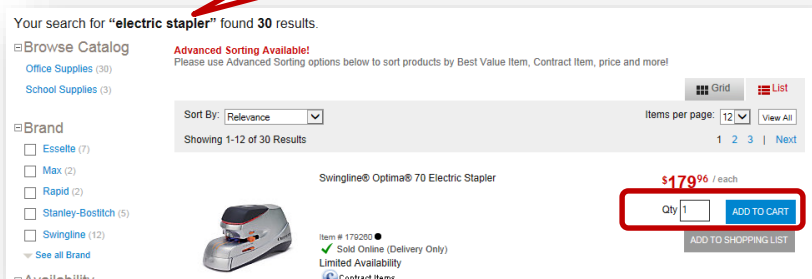


d. Navigate within the catalog as needed to locate, select, and add items to your cart.

- i. Each punchout catalog will have unique functionality and tools.
- ii. For catalog training documents, view categories at <http://www.nova.edu/procurement/vendors.html>.

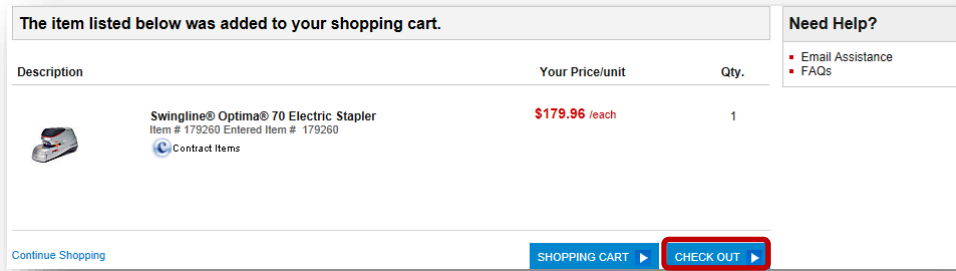


d. Examples of catalog navigation

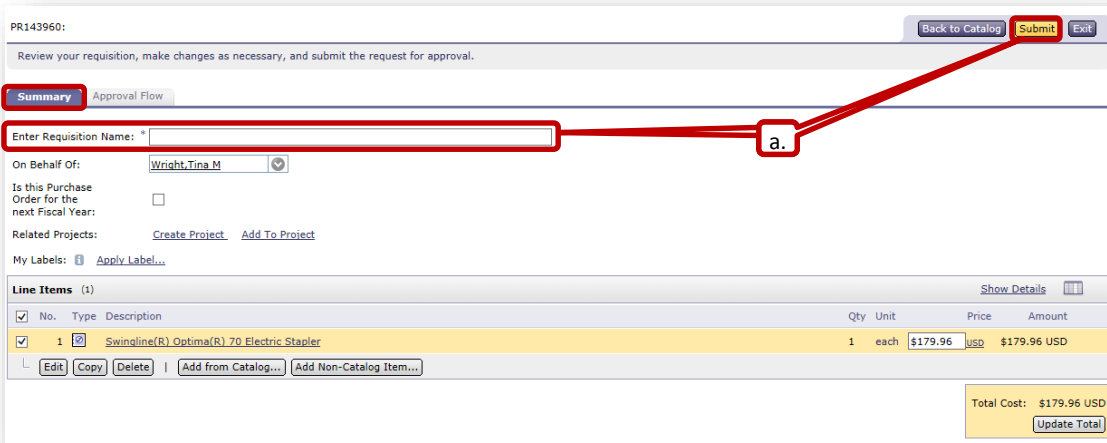




e. Check out of the punchout catalog to return to the Ariba requisition.



- 3. This will take you to the Ariba requisition 'Summary' tab.
  - a. Add a title and click 'Submit.'
  - i. Go to [edit](#) if errors are present or changes are needed.



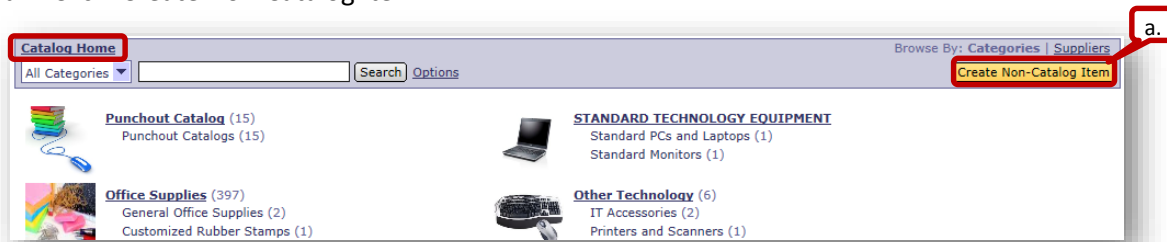
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## Create a Non-Catalog Requisition

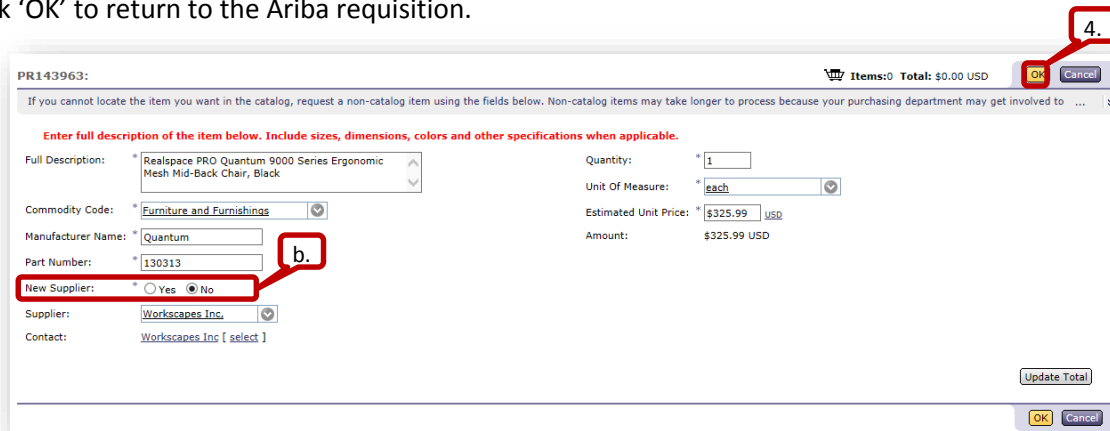
1. Click 'Create' → 'Requisition' at the top of the page, or through Common Actions.



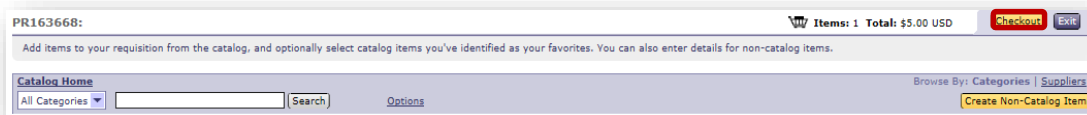
2. Catalog Home page
  - a. Click 'Create Non-Catalog Item.'



3. Complete all fields.
  - a. Fields marked with an asterisk are required to proceed.
  - b. Click 'Yes' for 'New Supplier:' if a supplier is not available in the Supplier drop down.
    - i. [Attach](#) a W9 to the 'Summary' tab of the requisition for new suppliers.
4. Click 'OK' to return to the Ariba requisition.



5. This will return you to Catalog Home.
  - a. 'Click Checkout' to return to the Summary tab of the requisition.





- b. Add a title, and click 'Submit.'
  - i. Go to [edit](#) if errors are present or changes are needed.

PR143963: Realspace Chair for Tina 12/15/2014

Review your requisition, make changes as necessary, and submit the request for approval.

**Summary** Approval Flow

Enter Requisition Name:

On Behalf Of:

Is this Purchase Order for the next Fiscal Year:

Related Projects: [Create Project](#) [Add To Project](#)

My Labels: [Apply Label...](#)

No.	Type	Description	Qty	Unit	Price	Amount
1		Realspace PRO Quantum 9000 Series Ergonomic ...	1	each	\$325.99 USD	\$325.99 USD

Supplier: Workscapes Inc, Contact: Workscapes Inc  
Accounting: Bill To: Accounts Payable- East Campus

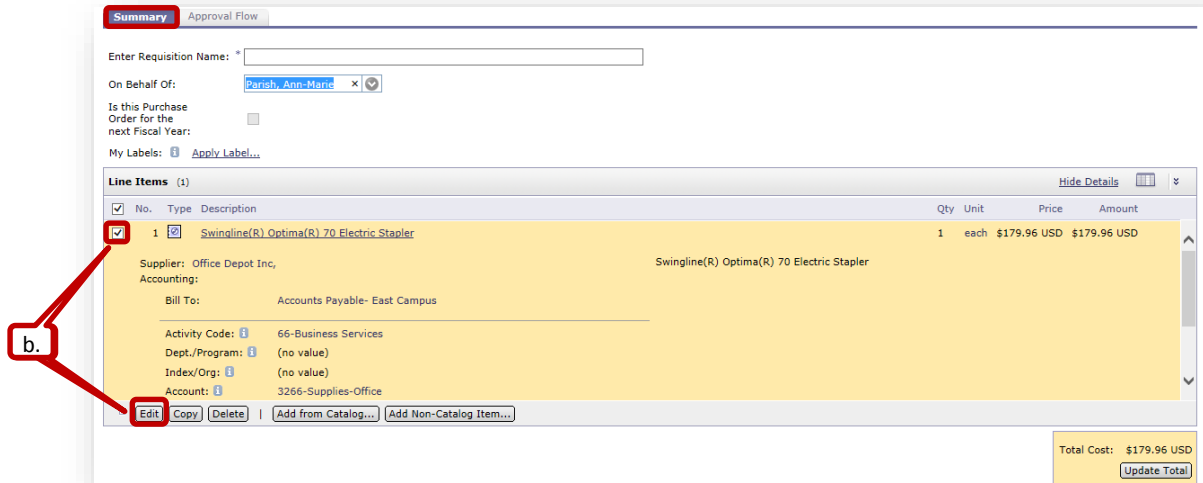
Activity Code: 66-Business Services  
Dept./Program: 66005-BUS SVS  
Index/Org: 160100-Off of Procurement Managmnt (OPM)

Total Cost: \$325.99 USD

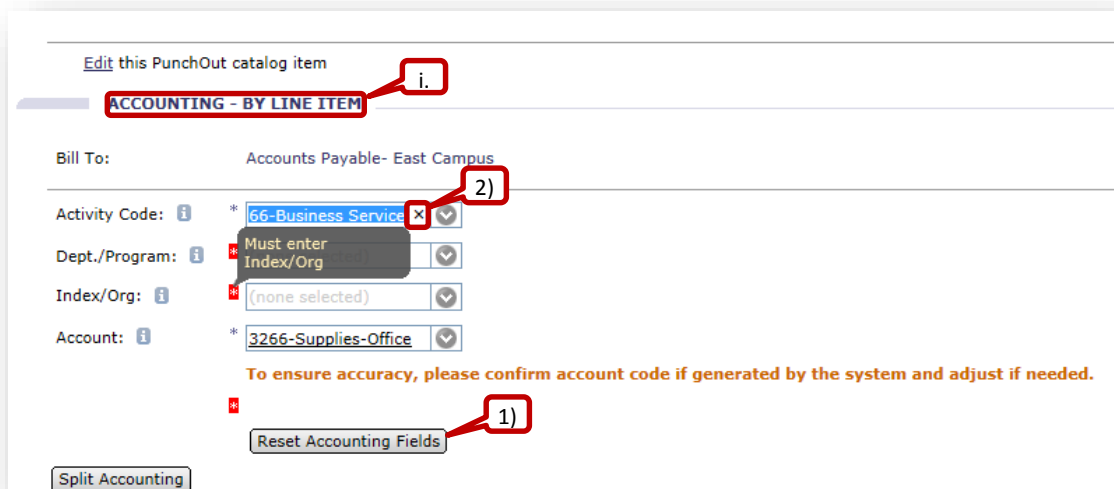
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## Edit Requisition

1. Once the order is created, you will return to the Ariba requisition 'Summary' tab.
  - a. Set default accounting and delivery information using [these](#) instructions, prior to entering an order.
    - i. Once defaulted, edits to shipping and accounting will be needed only when atypical information is used.
  - b. Click in the box next to the desired line item and click 'Edit.'



- i. Scroll down to 'Accounting – By Line Item.'
- ii. First, clear existing accounting, if needed.
  - 1) Click 'Reset Accounting Fields' to clear 'Index/Org' and 'Dept/Program.'
  - 2) Click in 'Activity Code' box and click the 'x' to clear this field.





- iii. Click on the drop down arrow for 'Index/Org.'
  - 1) The last few indexes used will be listed in the drop down.
  - 2) Click to choose one of these indexes, or click 'Search for More' for additional choices.

- a) Search for an index in the 'Choose Value for Index/Org' pop up.
- b) Click 'Select' to choose an index.

- iv. Click on the drop down arrow for Dept./Program and click 'Search for More.'

- 1) Only the Dept./Program matching the index will be shown—Click 'Select.'

v. Click on the drop down arrow for 'Activity Code' and click 'Search for More.'

ACCOUNTING - BY LINE ITEM

Bill To: Accounts Payable- East Campus

Activity Code: (none selected) [dropdown arrow]

- 66-Business Services
- 58-Stdnt Affrs & Coll of UG Studies
- 81-DIVISION OF CLINICAL OPERATIONS
- 75-Campus Housing
- 55-Sherman Library Rsrch Tech Ctr

Search for more... [button]

1) Only the Activity Code matching the index will be shown—click 'Select.'

ACCOUNTING - BY LINE ITEM

Bill To: Accounts Payable- East Campus

Activity Code: (none selected) [dropdown arrow]

Dept./Program: 66012-BUS SVS-PUBLI [dropdown arrow]

Index/Org: 155020-Publications Of [dropdown arrow]

Account: 3266-Supplies-Office [dropdown arrow]

To ensure accuracy, please confirm account code if generated by the system and adjust if needed.

**Choose Value for Activity Code**

Field: ID and/or Name [input] [Search]

ID and/or Name ↑	ID
(no value)	
66-Business Services	66

[Select] [Done]

vi. Accounting errors are now cleared.

vii. Scroll down to 'Shipping - By Line Item' and click on drop down arrow for 'Ship To:'

ACCOUNTING - BY LINE ITEM

Bill To: Accounts Payable- East Campus

Activity Code: 66-Business Services [dropdown arrow]

Dept./Program: 66012-BUS SVS-PUBLI [dropdown arrow]

Index/Org: 155020-Publications Of [dropdown arrow]

Account: 3266-Supplies-Office [dropdown arrow]

To ensure accuracy, please confirm account code if generated by the system and adjust if needed.

[Reset Accounting Fields]

[Split Accounting]

**SHIPPING - BY LINE ITEM**

Ship To: (none selected) [dropdown arrow]

Deliver To: Parish, Ann-Marie [input]

Floor: [input]

Room: [input]

Phone (xxx-xxx-xxxx): [input]

Need-by Date: [input] [calendar icon]

viii. Click on the 'Field:' drop down for more search options.

Choose Value for Ship To

Field: Name  Search

ID ↑	Name	Street	State	Postal Code	
ADMSVC	Admin Service Bldg	3600 South University Drive	FL	33328	Select
AHCCEN	Central Florida AHEC	328 S. Central Avenue	FL	32703	Select
AHCEVR	Everglades AHEC	5725 Corporate Way Suite 102	FL	33407	Select

ix. Select desired 'Field,' e.g. 'Street' for street address.

x. Enter search information and click 'Search.'

Choose Value for Ship To

Field: Street  Search

ID ↑	Name	Street	State	Postal Code	
ADMSVC	Admin Service Bldg	3600 South University Drive	FL	33328	Select
AHCCEN	Central Florida AHEC	328 S. Central Avenue	FL	32703	Select
AHCEVR	Everglades AHEC	5725 Corporate Way Suite 102	FL	33407	Select
AHCPSL	AHEC Community Affairs	University Park 584 NW University Blvd	FL	34986	Select
ALLIED	NSU College Health Care Sciences PA Program Terry	3200 South University Drive	FL	33314	Select

xi. Click 'Select' next to the correct address.

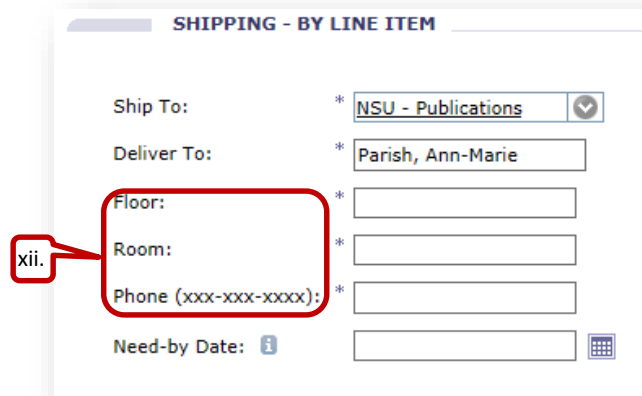
Choose Value for Ship To

Field: Street  Search

ID ↑	Name	Street	State	Postal Code	
RHILL2	NSU OIIT	8001 SW 36th Street Suite 2	FL	33314	Select
RHLBSV	NSU- Business Services	8001 SW 36th St	FL	33314	Select
RHLOPM	NSU - Procurement Management	8001 SW 36th St	FL	33314	Select
RHLPUB	NSU - Publications	8001 SW 36th St	FL	33314	Select

Done

xii. Manually type in the 'Floor,' 'Room,' and 'Phone' information.



**SHIPPING - BY LINE ITEM**

Ship To: \* NSU - Publications

Deliver To: \* Parish, Ann-Marie

Floor: \*

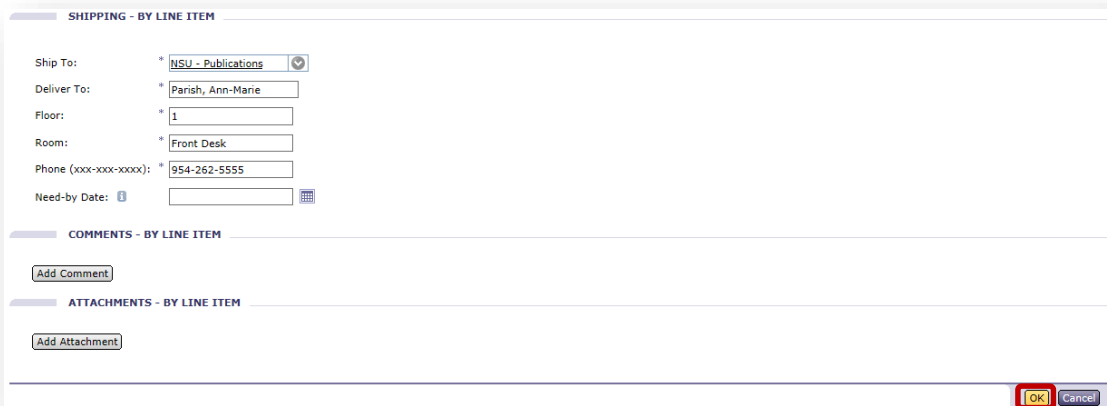
Room: \*

Phone (xxx-xxx-xxxx): \*

Need-by Date: ⓘ

**xii.**

xiii. Click 'OK' to accept these changes and return to the 'Summary' tab of the requisition.



**SHIPPING - BY LINE ITEM**

Ship To: \* NSU - Publications

Deliver To: \* Parish, Ann-Marie

Floor: \* 1

Room: \* Front Desk

Phone (xxx-xxx-xxxx): \* 954-262-5555

Need-by Date: ⓘ

**COMMENTS - BY LINE ITEM**

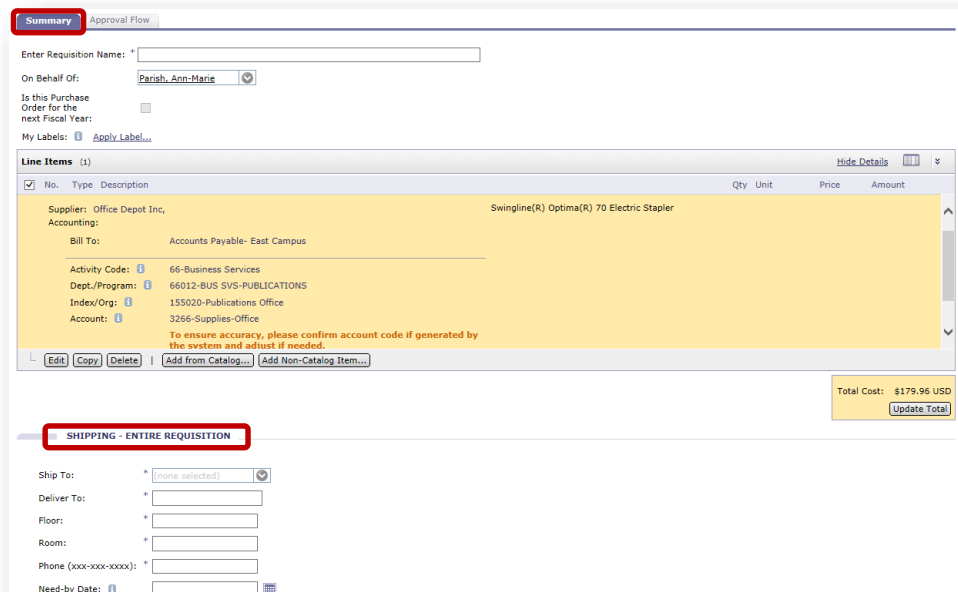
Add Comment

**ATTACHMENTS - BY LINE ITEM**

Add Attachment

**OK** Cancel

2. Follow the [same steps](#) to update 'Shipping – Entire Requisition.'



**Summary** Approval Flow

Enter Requisition Name: \*

On Behalf Of: Parish, Ann-Marie

Is this Purchase Order for the next Fiscal Year:

My Labels: ⓘ Apply Label...

**Line Items (1)**

No.	Type	Description	Qty	Unit	Price	Amount
		Supplier: Office Depot Inc, Swingline(R) Optima(R) 70 Electric Stapler				
		Accounting: Accounts Payable- East Campus				
		Activity Code: ⓘ 66-Business Services				
		Dept./Program: ⓘ 66012-BUS SVS-PUBLICATIONS				
		Index/Org: ⓘ 155020-Publications Office				
		Account: ⓘ 3266-Supplies-Office				

To ensure accuracy, please confirm account code if generated by the system and adjust if needed.

[ Edit ] [ Copy ] [ Delete ] | Add from Catalog... | Add Non-Catalog Item...

Total Cost: \$179.96 USD [ Update Total ]

**SHIPPING - ENTIRE REQUISITION**

Ship To: \* [none selected]

Deliver To: \*

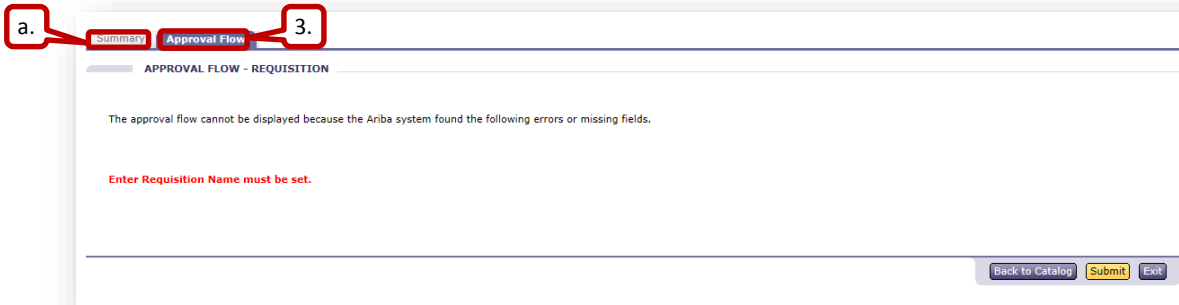
Floor: \*

Room: \*

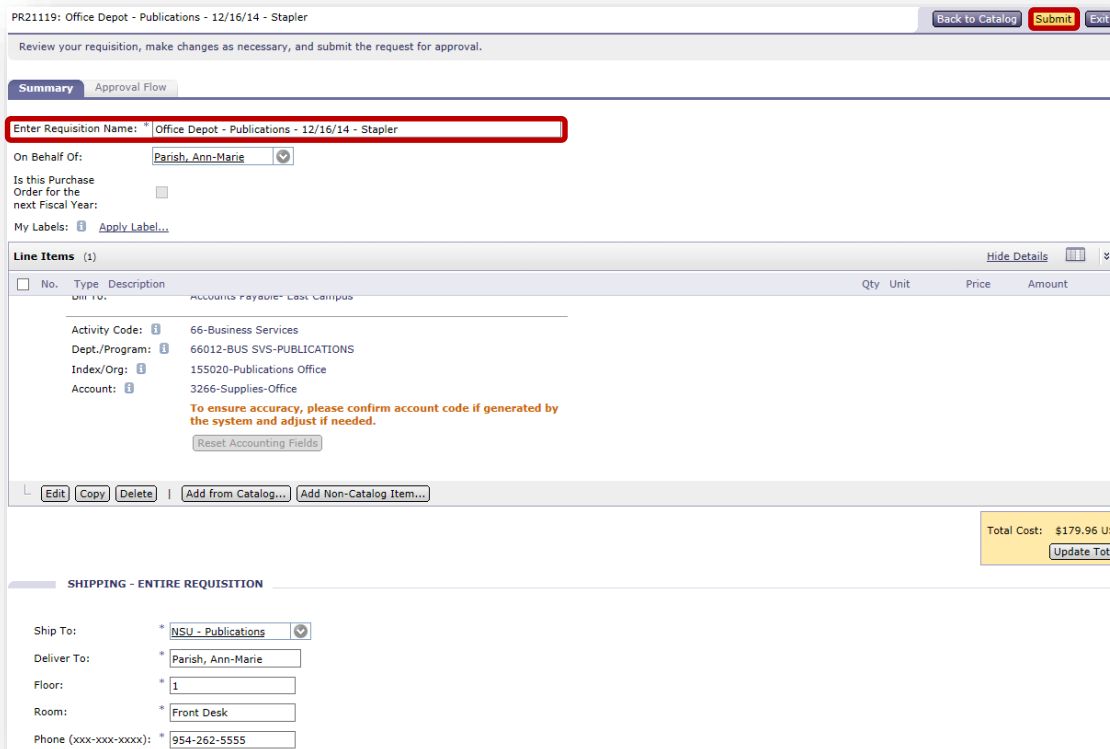
Phone (xxx-xxx-xxxx): \*

Need-by Date: ⓘ

3. Click on the Approval Flow tab, to see if all errors are now cleared.
  - a. Click the 'Summary' tab to make additional [edits](#).



4. When all errors are cleared, enter a requisition title and click 'Submit.'



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## Search for Requisitions

Previous requisitions can be searched for in Ariba at any time.

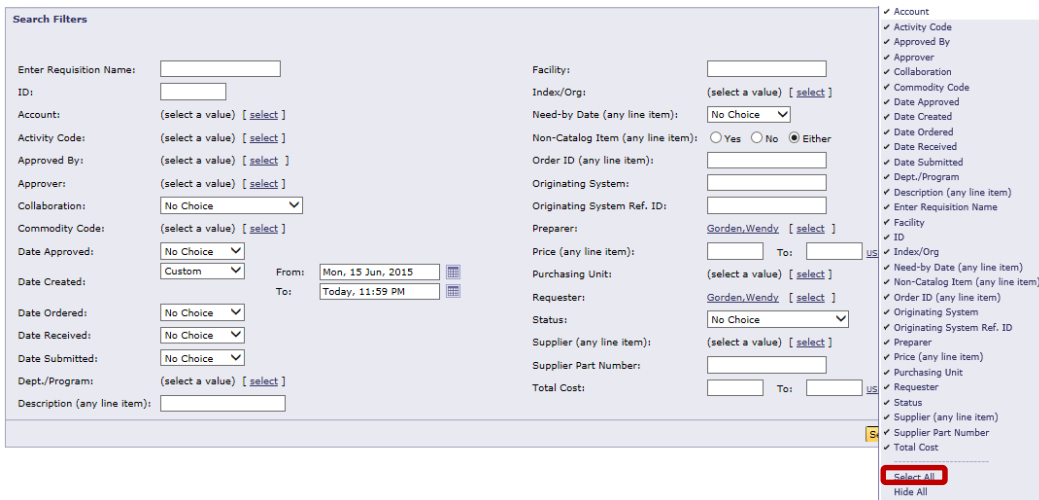
1. Click 'Search' then 'Requisition' to start a document search.
  - a. Most Ariba users have permission to view only documents that they create or are an approver for.



2. Set your search options the first time you search for a document.
  - a. Click 'Search Options' to view the available search filters.



- b. Scroll to the bottom of the 'Search Options' drop down and click 'Select All.'



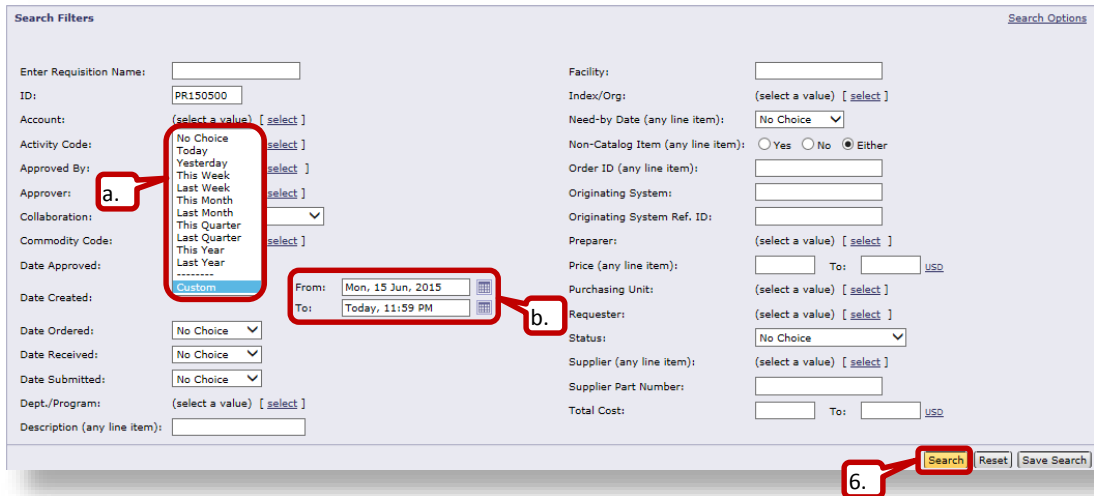
3. Click 'Select' next to 'Preparer' and click 'Clear' each time you search, to remove the defaulted information.
  - a. Repeat these steps under 'Requester.'
    - i. Clear defaults to ensure inclusive search results. If 'Preparer' and 'Requester' are not cleared, only documents prepared and requested by the listed user will display in search results.



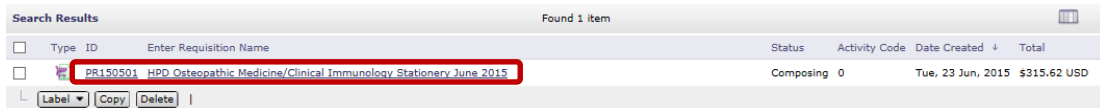
4. Type the PR number into the 'ID:' field.
  - a. Enter the DO number into the 'Order ID' field if the PR is not available.
    - i. Enter the exact Ariba DO number, without the additional 0 added in Banner.
      - 1) Example: Search for DO12345 not DO012345
5. Note the 'Date Created' field is now defaulted to the previous two weeks.



- a. Click the 'Date Created:' drop down to select a predetermined date range.
- b. OR click on the calendar icons to select a specific date range.



6. Click 'Search.'
7. Click the document number or name to open the located document(s.)



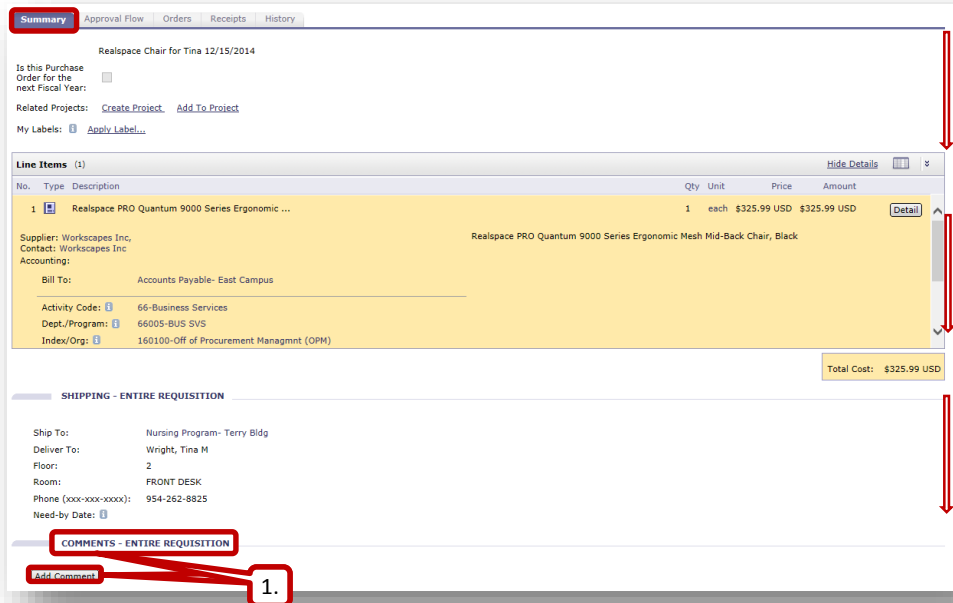
Type	ID	Enter Requisition Name	Status	Activity Code	Date Created	Total
<input type="checkbox"/>	PR150501	HPD Osteopathic Medicine/Clinical Immunology Stationery June 2015	Composing	0	Tue, 23 Jun, 2015	\$315.62 USD

- a. Add [approvers](#), [attachments](#), or [comments](#) to Composing or Submitted documents without editing.

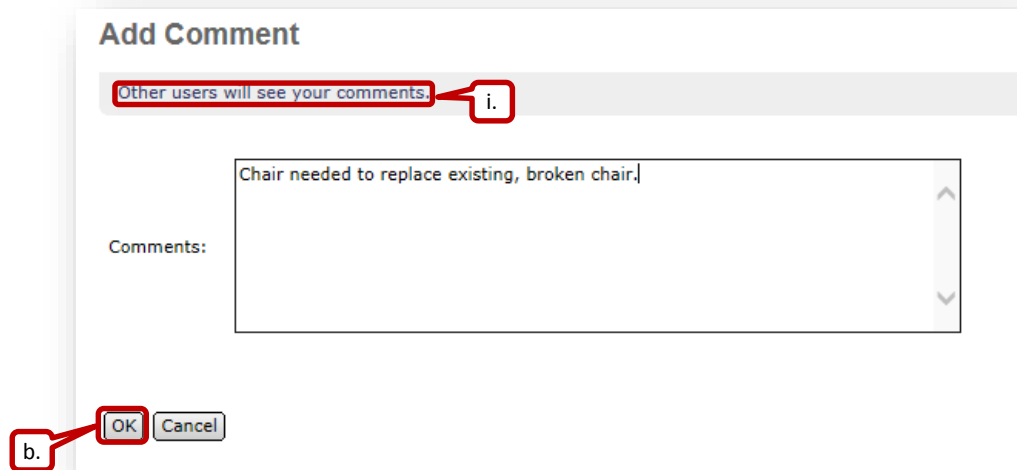
## Comments and Attachments

Comments and attachments are used to explain details or reasons for an order to approvers. Comments and attachments can be added to 'Submitted' documents without clicking 'Edit' or 'Withdraw.'

1. Click 'Add Comment' under 'Comments – Entire Requisition' to create a new comment.

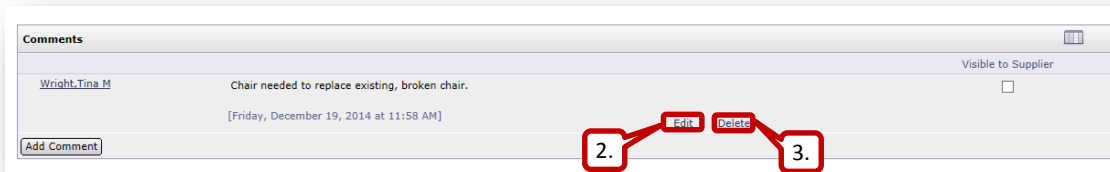


- a. Type the desired comment.
  - i. Comments are visible to all individuals with access to view this document, including approvers, Procurement, and Accounts Payable.
- b. Click 'OK.'

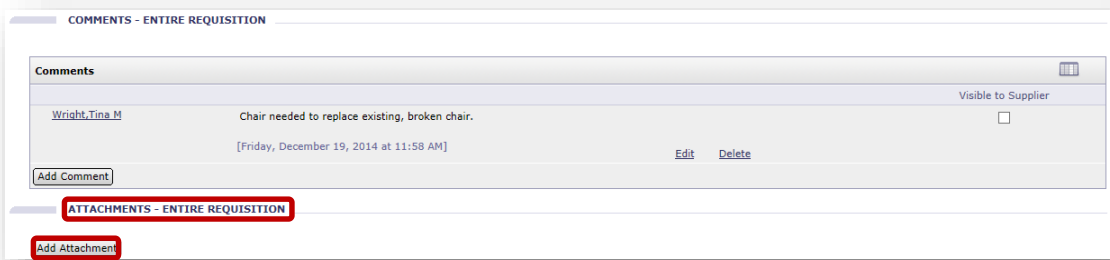




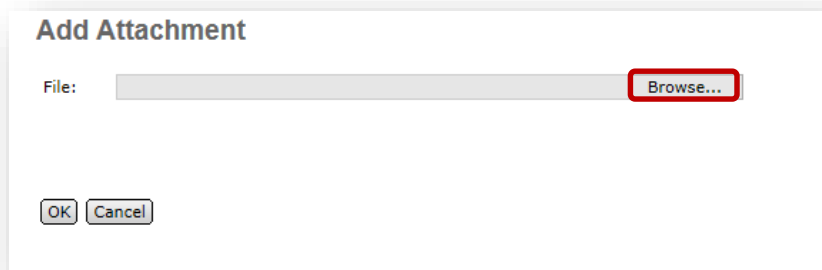
2. Click 'Edit' to modify a comment.
  - a. Adjust the comment as needed, and click 'OK.'
3. Click 'Delete' to remove a comment.



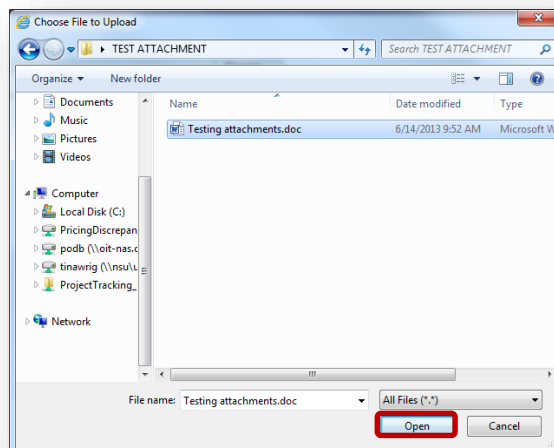
4. On the 'Summary' tab under 'Attachments – Entire Requisition,' click 'Add Attachment.'



- a. Click 'Browse' to search your computer for the document.

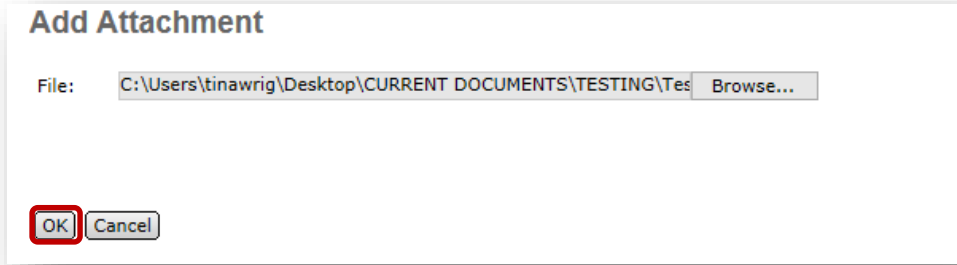


- b. Click on the document and click 'Open' to select.



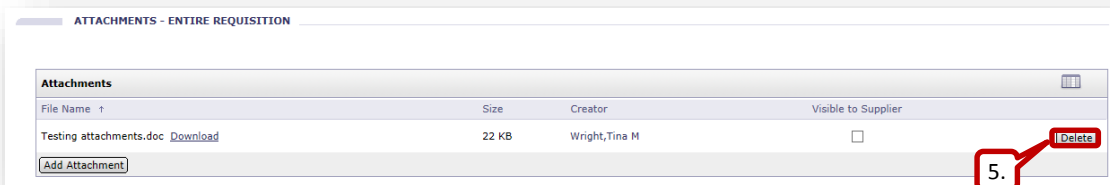


- c. Click 'OK' to add the attachment.



- i. Attachments are visible to all individuals with access to view this document, including approvers, Procurement, and Accounts Payable.

- 5. Click 'Delete' to remove an attachment.

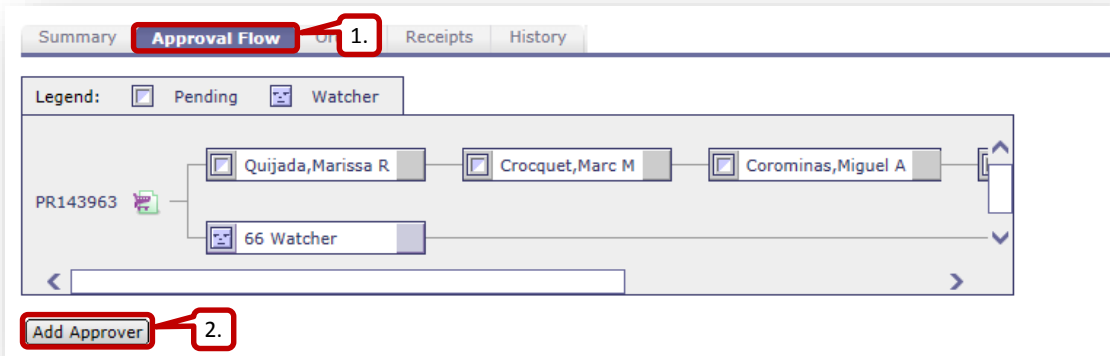


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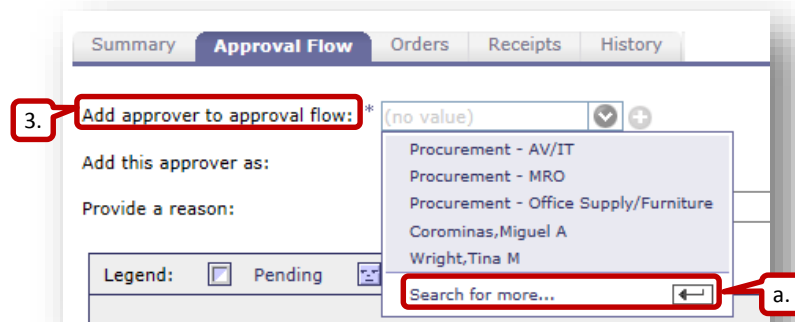
### Add an Approver

Approvers and watchers can be added to 'Submitted' documents without clicking 'Edit' or 'Withdraw.'

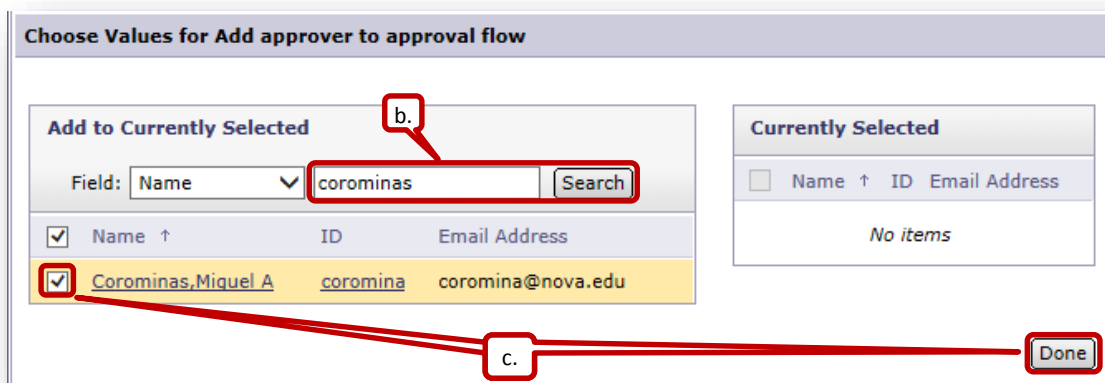
1. Click the 'Approval Flow' tab.
2. Click 'Add Approver.'



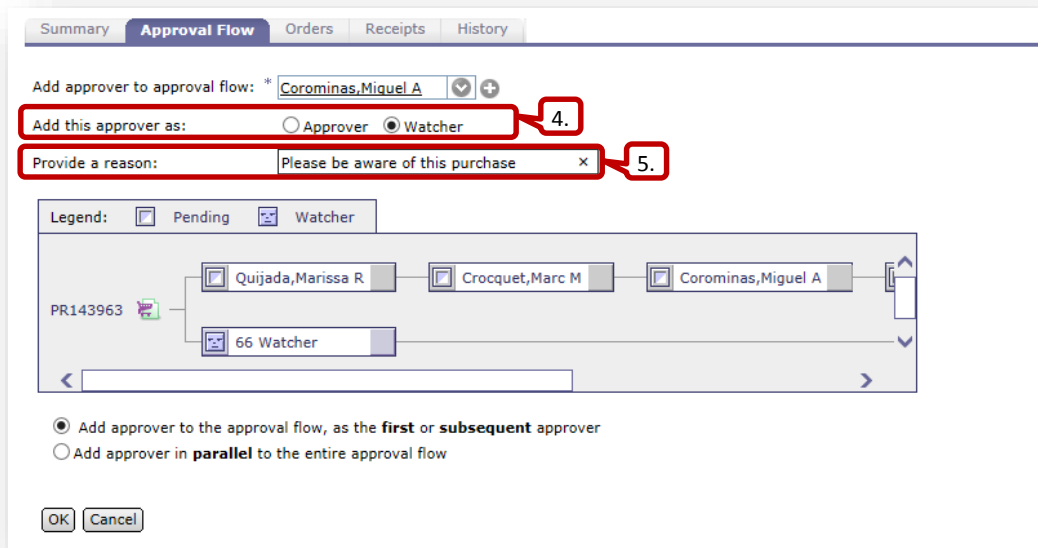
3. Click the drop down arrow for the 'Add approver to the approval flow:' field.
  - a. Click 'Search for more.'



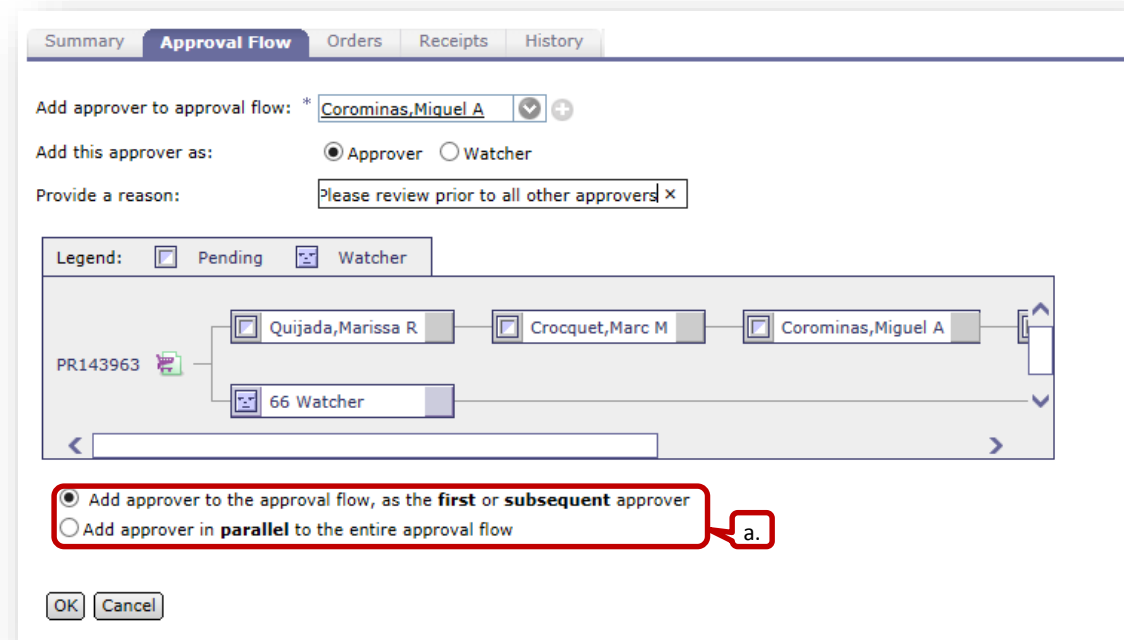
- b. Type the approver's last name or first name and click 'Search.'
  - c. Click the check box next to the approver's name and click 'Done' to select.



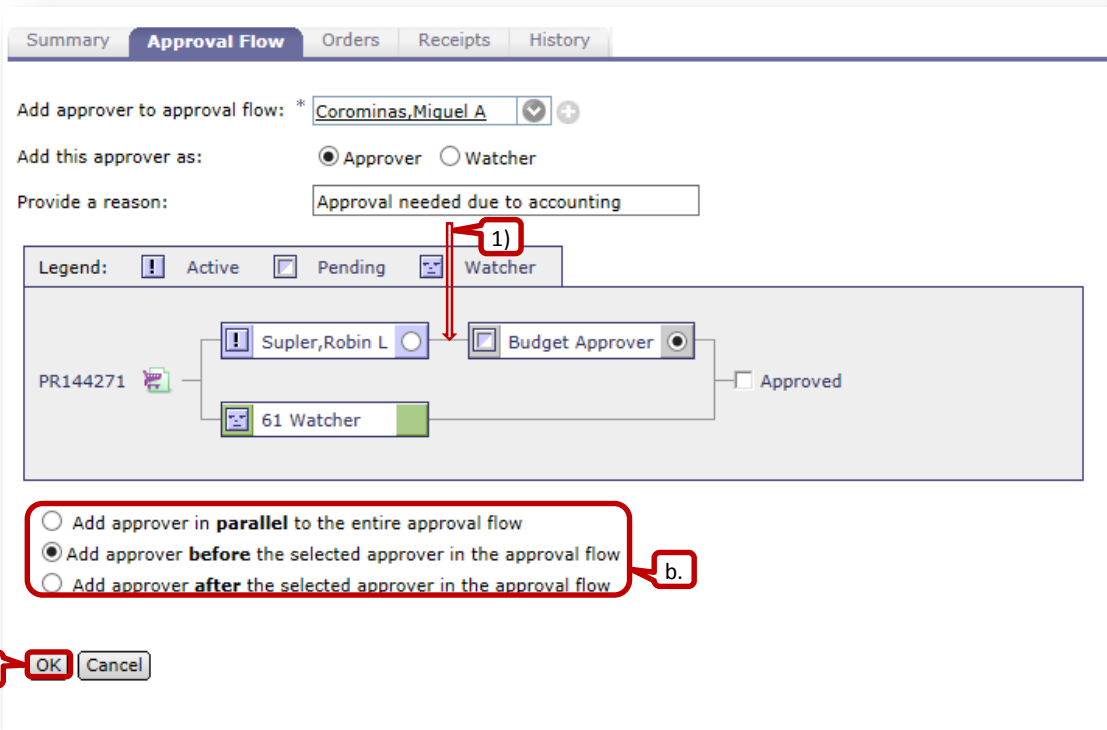
4. In the 'Add this approver as:' field, click the radio button next to 'Approver' or 'Watcher' to select approval type.
  - a. Approvers must approve the requisition before it can be ordered.
  - b. Watchers are given access to review documents, but do not approve.
5. Type a note into 'Provide a reason,' letting the individual know why he or she has been added as an approver.



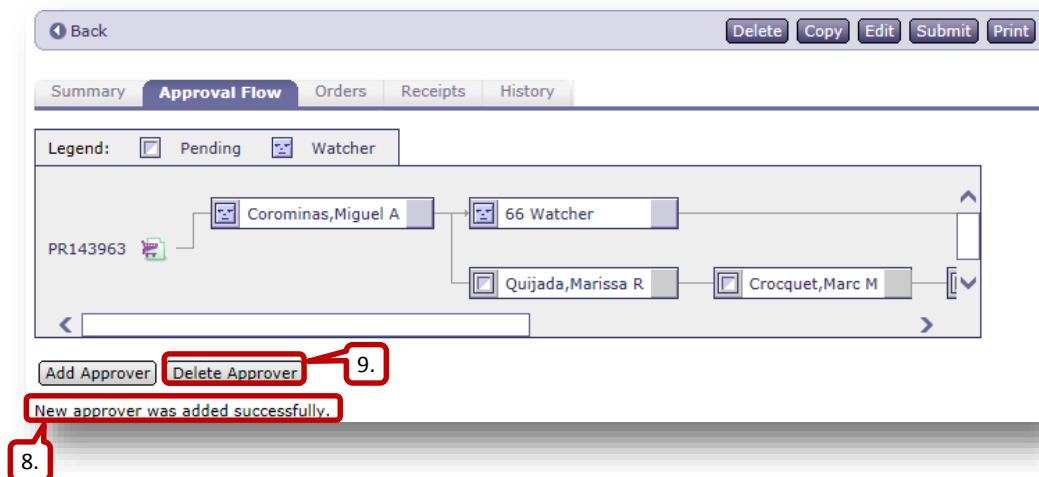
6. Choose the location to add the approver.
  - a. Composing requisition options are
    - i. 'first or subsequent'
    - ii. 'parallel to the entire approval flow'



- b. Submitted requisition options are
    - i. 'parallel to the entire approval flow'
    - ii. 'before the selected approver'
    - iii. 'after the selected approver'
- 1) In this example, the approver would be added before 'Budget Approver.'



- 7. Click 'OK' to add the new approver.
- 8. 'New approver was added successfully' message will display.
- 9. Click 'Delete Approver' to remove a manually added approver.
  - a. Only manually added approvers can be deleted, and only by the individual who added them.



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