

Create Catalog Requisition

Updated: 1/4/2024

PURPOSE

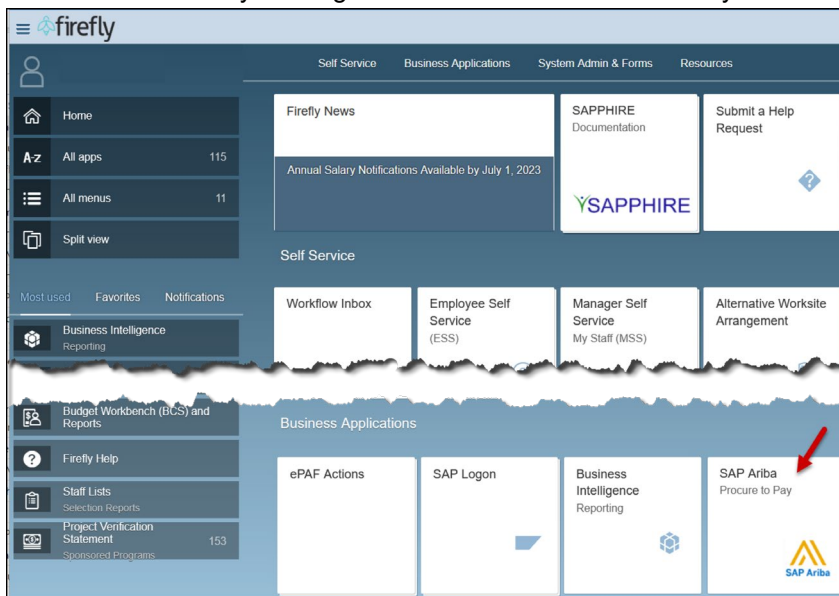
This Quick Reference Guide (QRG) is designed to show the steps needed to create a Catalog-based Requisition in SAP Ariba. It will also detail what to do when a requisition is denied (end of document).

HELPFUL HINTS

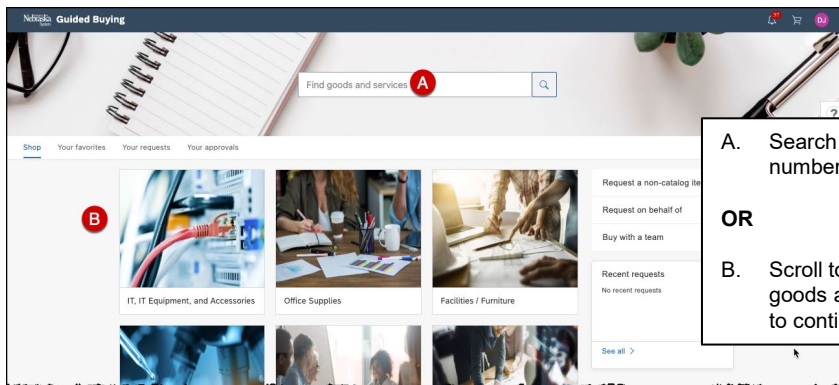
- Assemble all supporting documentation prior to beginning work in SAP Ariba.
- For the best experience, please use the following browsers:
 - Google Chrome (64-bit)
 - Apple Safari (64-bit)
 - Microsoft Edge (32-bit)
 - Microsoft Edge Chromium (32-bit and 64-bit)
 - Mozilla Firefox (64-bit)

PROCEDURE

1. Access SAP Ariba by clicking the “SAP Ariba – Procure to Pay” tile in Firefly.



2. Search for items as shown below.



A. Search by entering a keyword, part number, or other search term.

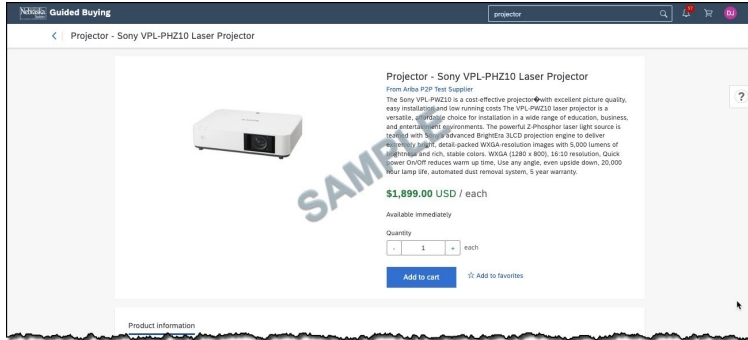
OR

B. Scroll to review the tiles (categories) of goods and services available. Click a tile to continue.

PROCEDURE (CONTINUED)

- 2. (continued) As shown below, items can be located directly within Guided Buying (i.e., "hosted catalog" items) or via a link to a supplier website (i.e., "punchout catalogs").

Hosted Catalog Items

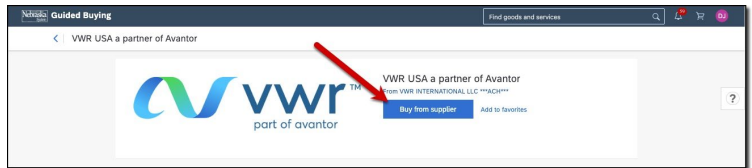


Search for and select desired items. Enter the desired quantity. Click "Add to cart."

Proceed to Step #3 below.

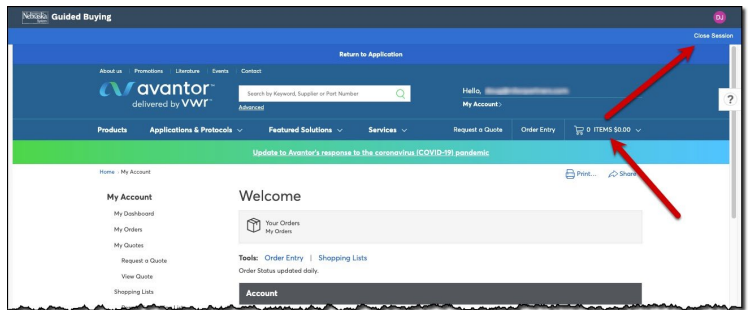
Punchout Catalog Items

Search for the desired supplier. Click the "Buy from supplier" link. The supplier website will open within SAP Ariba.

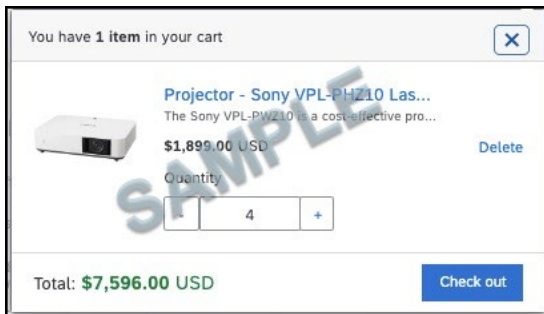


Search for item(s) on the supplier site. Add item(s) to your shopping cart. Follow the prompts to "checkout" of the supplier site and return to SAP Ariba. NOTE: Click "Close session" to exit the supplier site without item(s) in your shopping cart.

Proceed to Step #3 below.

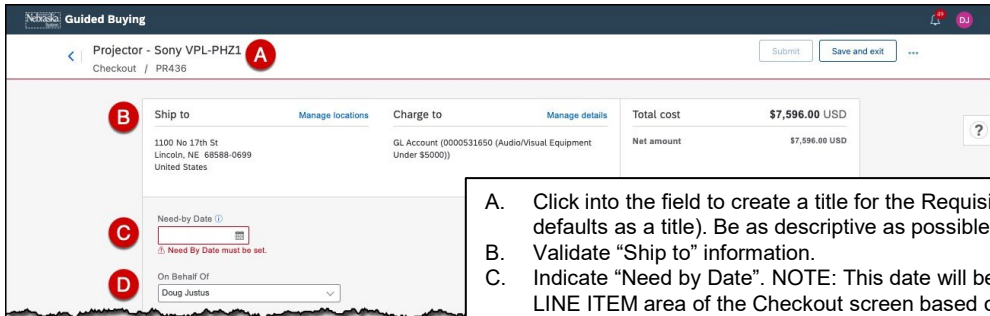


- 3. The confirmation screen displays. Continue shopping and add additional items to your cart or click "Check out" to proceed.

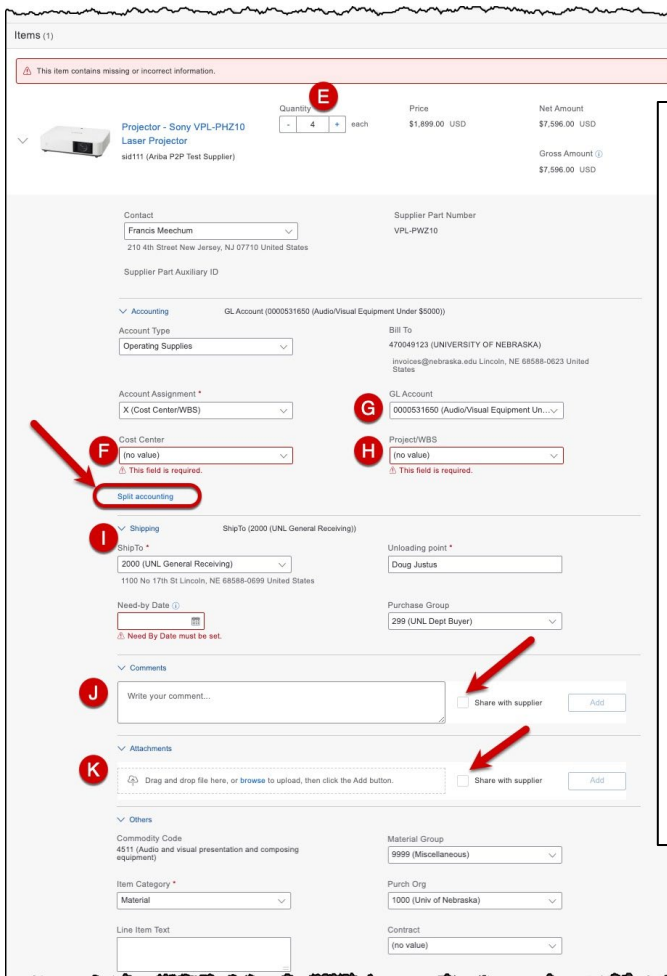


PROCEDURE (CONTINUED)

4. The "Summary" screen displays. Complete the screen as noted below.



- A. Click into the field to create a title for the Requisition (the item name defaults as a title). Be as descriptive as possible.
- B. Validate "Ship to" information.
- C. Indicate "Need by Date". NOTE: This date will be validated in the LINE ITEM area of the Checkout screen based on supplier lead time.
- D. Validate "On Behalf Of" information. The "On Behalf Of" defaults to the current user; however, you can search for and select a new user. The Requisition will then update to reflect that user's "Charge to" information and approval workflow.



- E. (optional) Modify LINE ITEM quantity. NOTE: Quantity of **punchout catalog** items cannot be modified here. To modify **punchout catalog** line items, delete the line item and return to the supplier website.
 - F. Enter or validate the Cost Center to be charged for this LINE ITEM (it will default to the Requester's Cost Center).
 - G. Validate the GL Account for the LINE ITEM.
 - H. Search for or validate the Project/WBS for this LINE ITEM.
 - I. Validate the shipping info for this LINE ITEM.
 - J. (optional) Comments – Can be added here for the LINE ITEM. Indicate if text should be visible to the supplier. (NOTE: Comments added here are at the LINE ITEM level. To add comments pertinent to the entire document, see next page.)
 - K. (optional) Attachments – Can be added here for the LINE ITEM. Indicate if the attachment(s) should be available to the supplier. You cannot open/view an attachment once it is added here. (NOTE: Attachments added here are at the LINE ITEM level. To add attachments pertinent to the entire document, see next page.)
- NOTE: See "Split Accounting" info on next page of this Guide.

PROCEDURE (CONTINUED)

4. (continued) The "Summary" screen displays. Complete the screen as noted below.

Accounting: GL Account (0000531650 (Audio/Visual Equipment Under \$5000))

Account Type: Operating Supplies

Account Assignment: X (Cost Center/WBS)

Split accounting type: Percentage

Amount to split: \$7,596.00 USD

Allocated percentage: 100.00 %

Unallocated percentage: 0.00 %

GL Account	Percentage	Quantity	Amount
GL Account (0000531650 (Audio/Visual Equipment Under \$5000))	100 % <small>Invalid allocation</small>	4.00	\$7,596.00 USD
GL Account (0000531650 (Audio/Visual Equipment Under \$5000))	0 % <small>Percentage must not be zero. Quantity must not be zero. Amount must not be zero.</small>	0.00	\$0.00 USD

GL Account: 0000531650 (Audio/Visual Equipment Under \$5000)

Project/WBS: (no value)

Cost Center: 0000001000 (ARIBA-Corporate Services)

+ Add split

(optional) Line items can be split between cost centers, GLs, or Project/WBS. In all cases, the total of splits must equal 100%.

- To add comments at the document level, enter them in the text box. To add attachment(s) at the document level, upload them in the area provided. For each, indicate whether or not to share with the supplier by checking the checkbox.
- Click "Add".

Comments

Write your comment...

Share with supplier

Attachments

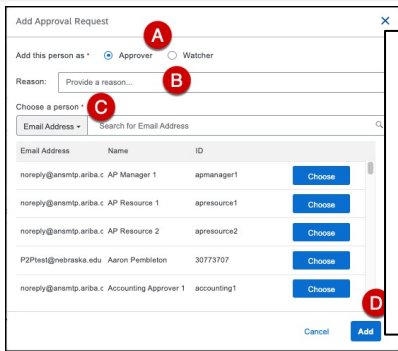
Drag and drop file here, or to upload, then click the Add button.

Share with supplier

NOTE: If comments and/or attachments are not line-item specific, it is recommended that they always be entered/attached at the document level as they are easier to be overlooked at the line-item level.

PROCEDURE (CONTINUED)

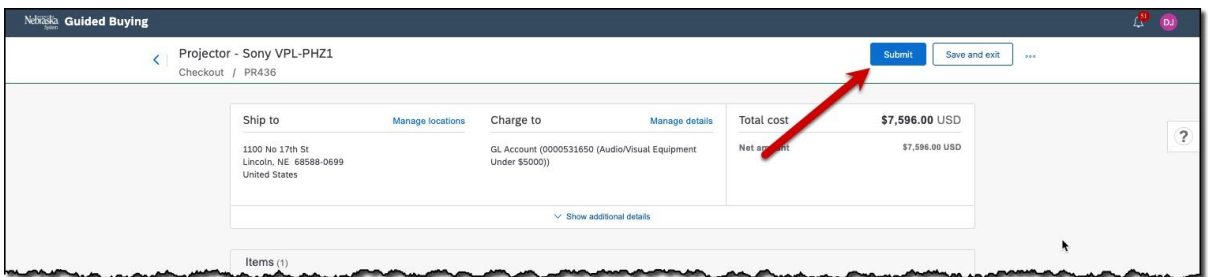
7. Scroll to the bottom of the Checkout screen and view the current approval workflow. The approval workflow will update as the requisition progresses through the approval process. (optional) To add an Approver/Watcher, mouse over the dashed line on either side of an existing Approver and click the “ + ” icon.



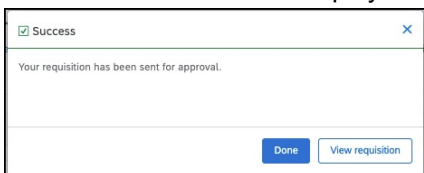
- Select type of role:
 - Approver – Must take action on the request.
 - Watcher – Will receive notifications regarding the status of the request but will not be required to take action on the request.
- (optional) Provide a reason why this user is being added to the workflow.
- Search for and select the user to be added.
- Click “Add”.

8. Once all edits on the Checkout screen have been completed, scroll to the top of the screen and click “Submit” to send the Requisition for approval.

NOTE: If there is missing/incorrect information on the Checkout screen, the “Submit” button will remain grayed-out until all items are corrected.



9. The confirmation screen displays.

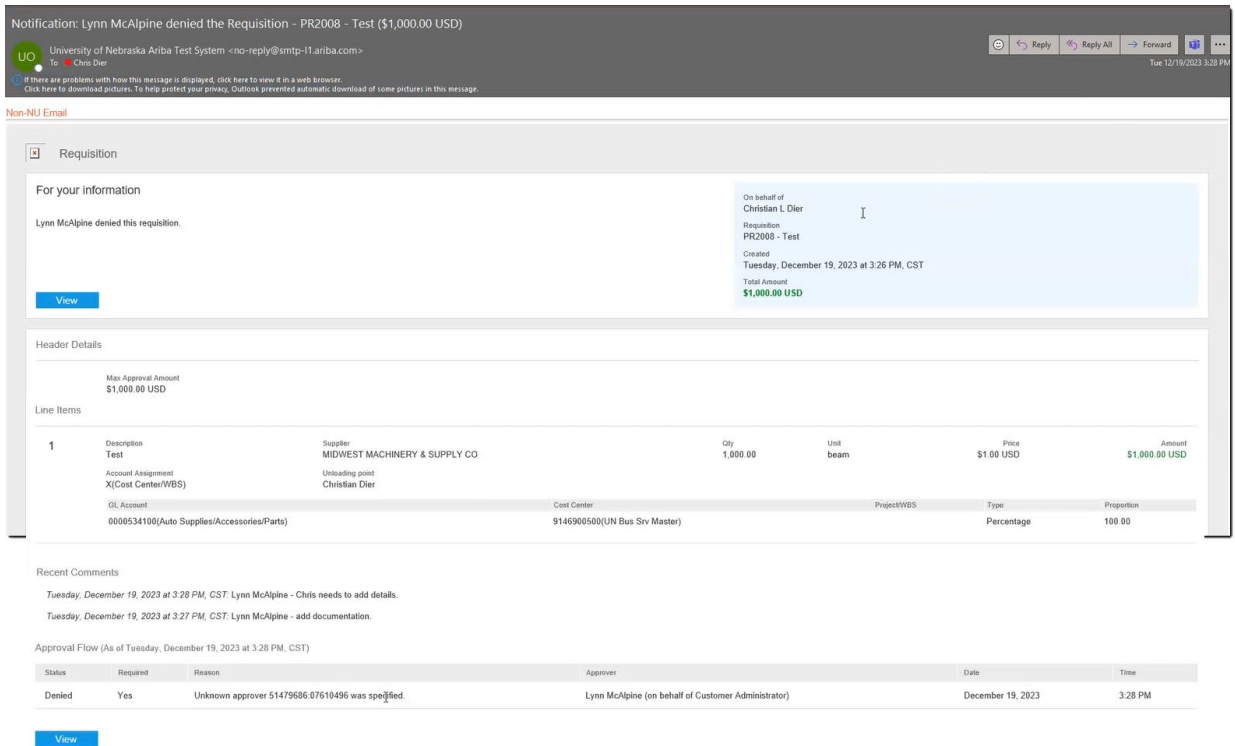


PROCEDURE (CONTINUED)

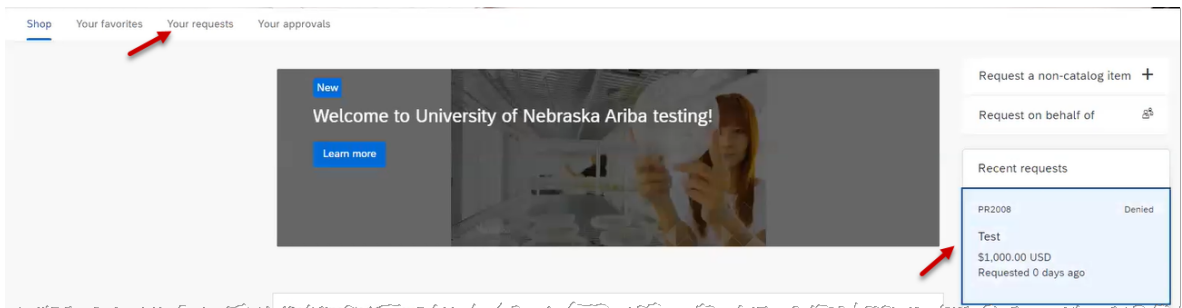
What To Do When a Requisition Is Denied

The following example will demonstrate how to withdraw a denied requisition. In this case, the approver has denied the request because she needs additional documentation. To edit a denied request, you must first withdraw it.

When a request is denied, you will receive an email similar to the one shown below.

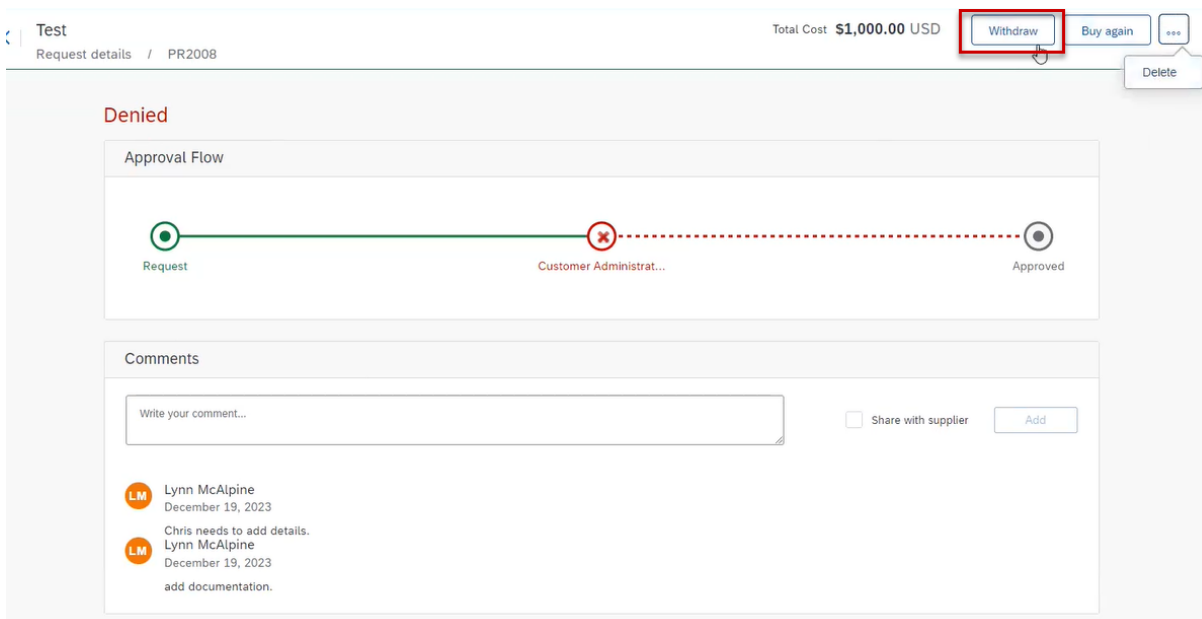


1. To locate a requisition, go to the “Your requests” tab in the Guided Buying home page or, if recently created, go to the “Recent requests” pane on the right-hand side of the same page.

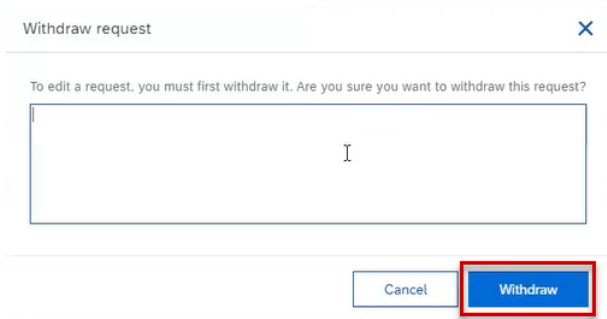


PROCEDURE (CONTINUED)

2. With the denied requisition open, there are three options at the top right of the document: “Withdraw”, “Buy again”, and “Delete” (click the ellipses icon). Click “Withdraw”.

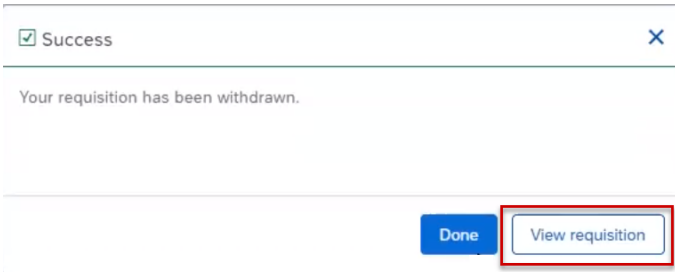


3. A “Withdraw request” dialog box opens. Enter comments in the text field and click “Withdraw”.

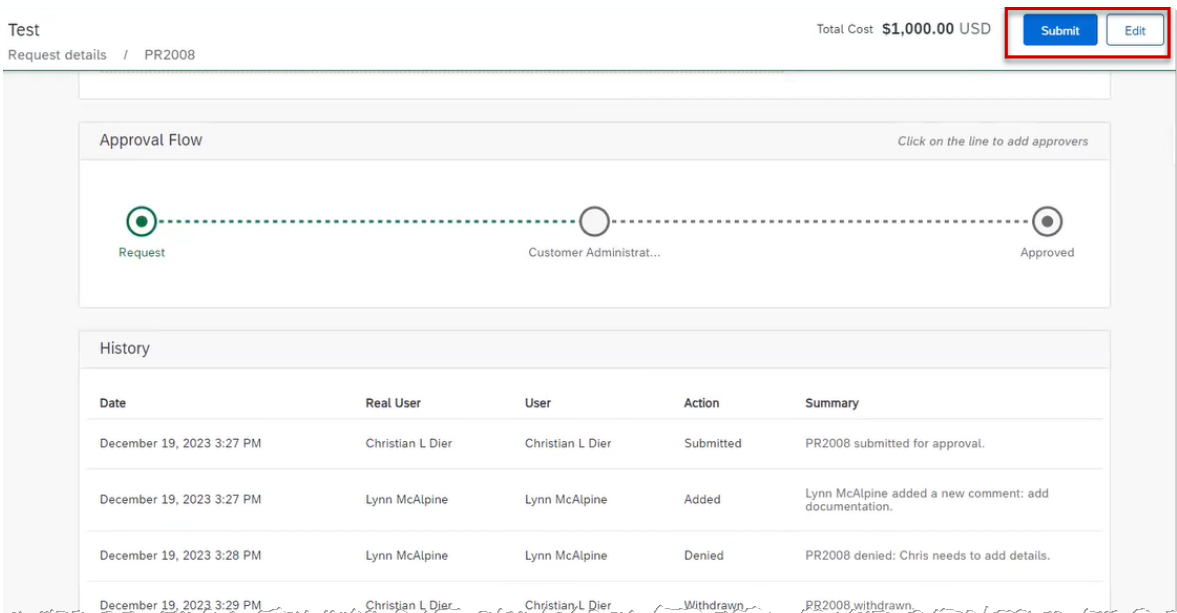


PROCEDURE (CONTINUED)

4. A success message appears. Click “View requisition” to open the request.



5. Click “Edit”, make required changes to the request, and click “Submit” after edits have been made.



6. A success message opens. Click “Done”. The request will be re-routed through the normal approval channels.

