Create Catalog Requisition

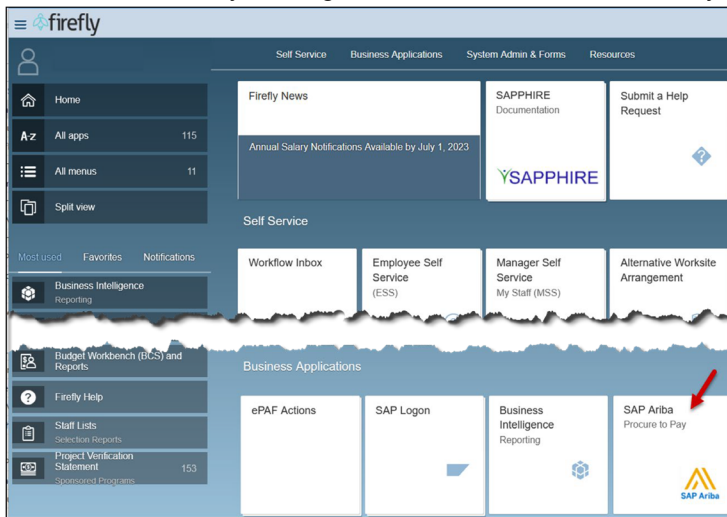*Updated: August 29, 2024*

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).
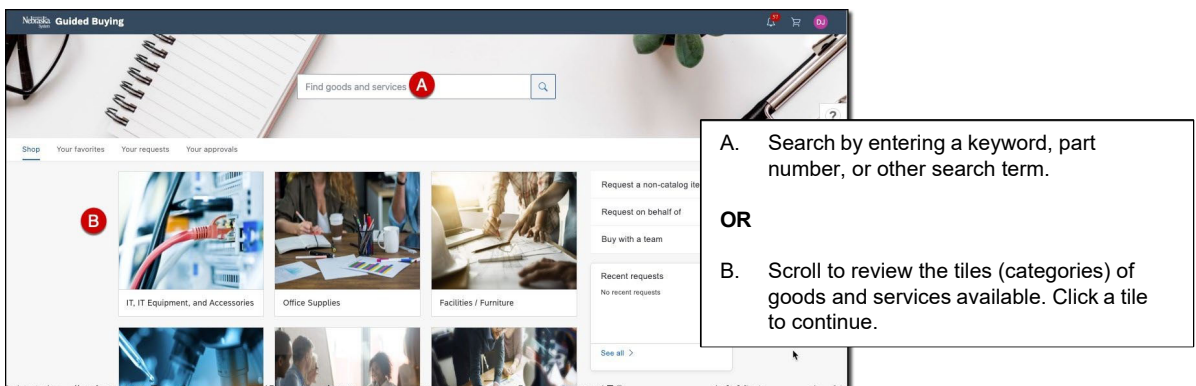
HELPFUL HINTS

- 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.

3. 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").
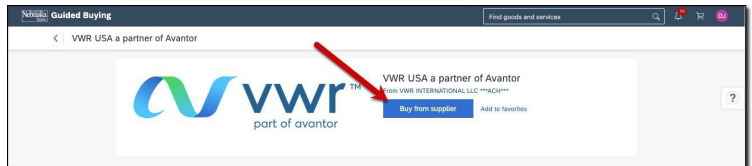
Hosted Catalog Items
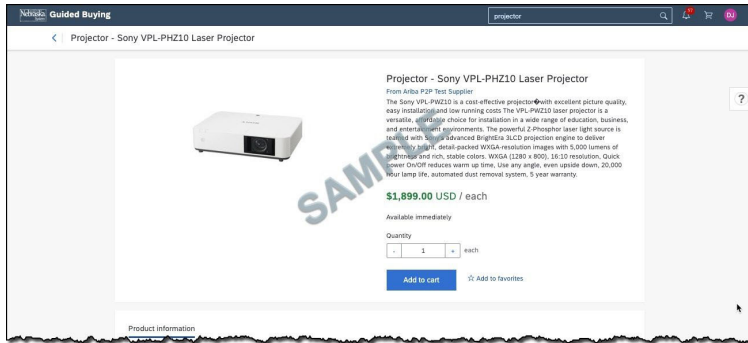
Search for and select desired items. Enter the desired quantity. Click "Add to cart."

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.
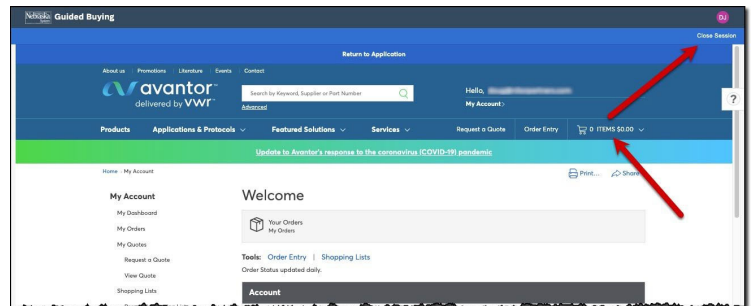
4. The confirmation screen displays. Continue shopping and add additional items to the cart or click "Check out" to proceed.

5. The "Summary" screen displays. Complete the screen as noted below.
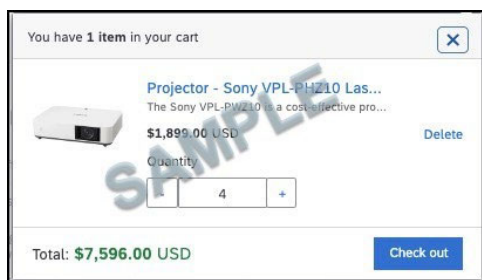
Guided Buying

Projector - Sony VPL-PHZ1 **A**
Checkout / PR436   Submit   Save and exit   ...

B   Ship to   Manage locations   Charge to   Manage details   Total cost $7,596.00 USD

1100 No 17th St   GL Account (0000531650 (Audio/Visual Equipment   Net amount $7,596.00 USD
Lincoln, NE 68588-0699   Under $5000))
United States

C   Need-by Date ⓘ
⚠ Need By Date must be set.

D   On Behalf Of
Doug Justus

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. **Include Unloading Point -Provide specific, detailed delivery information to get your package where it needs to go; include building abbreviation, room number, last name. Shipping information should be at the header ONLY.**
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.

Items (1)

⚠ This Item contains missing or incorrect information.

Projector - Sony VPL-PHZ10   Quantity   Price   Net Amount
Laser Projector   **E** - 4 + each $1,899.00 USD $7,596.00 USD
sid111 (Ariba P2P Test Supplier)   Gross Amount ⓘ
                                                                      $7,596.00 USD

Contact   Supplier Part Number
Francia Meechum   VPL-PWZ10
210 4th Street New Jersey, NJ 07710 United States

Supplier Part Auxiliary ID

⌄ Accounting   GL Account (0000531650 (Audio/Visual Equipment Under $5000))
Account Type   Bill To
Operating Supplies   470049123 (UNIVERSITY OF NEBRASKA)
                                      invoices@nebraska.edu Lincoln, NE 68588-0623 United
                                      States
Account Assignment *   GL Account
X (Cost Center/WBS)   **G**   0000531650 (Audio/Visual Equipment Un...⌄
Cost Center   **H**   Project/WBS
F (no value)   (no value)
⚠ This field is required.   ⚠ This field is required.

Split accounting

I ⌄ Shipping   ShipTo (2000 (UNL General Receiving))
ShipTo *   Unloading point *
2000 (UNL General Receiving)   Doug Justus
1100 No 17th St Lincoln, NE 68588-0699 United States
Need-by Date ⓘ   Purchase Group
                                      299 (UNL Dept Buyer)
⚠ Need By Date must be set.

⌄ Comments
J Write your comment...   Share with supplier   Add

⌄ Attachments
K ⊕ Drag and drop file here, or browse to upload, then click the Add button.   Share with supplier   Add

⌄ Others
Commodity Code   Material Group
4511 (Audio and visual presentation and composing   9999 (Miscellaneous)
equipment)
Item Category *   Purch Org
Material   1000 (Univ of Nebraska)
Line item Text   Contract
                                      (no value)

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. (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.)
J. (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.

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

7. 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.

8. Click "Add".

Note: If comments and/or attachments are not line-item specific, it is recommended to enter/attach at the document level as it is easier to be overlooked at the line-item level.

9. 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.

A. 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.
B. (optional) Provide a reason why this user is being added to the workflow.
C. Search for and select the user to be added.
D. Click "Add".

10. 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.

11. The confirmation screen displays.

REQUISITION IS DENIED: WHAT TO DO

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, it must first be withdrawn.

When a request is denied, an email will be sent out like the one shown below.
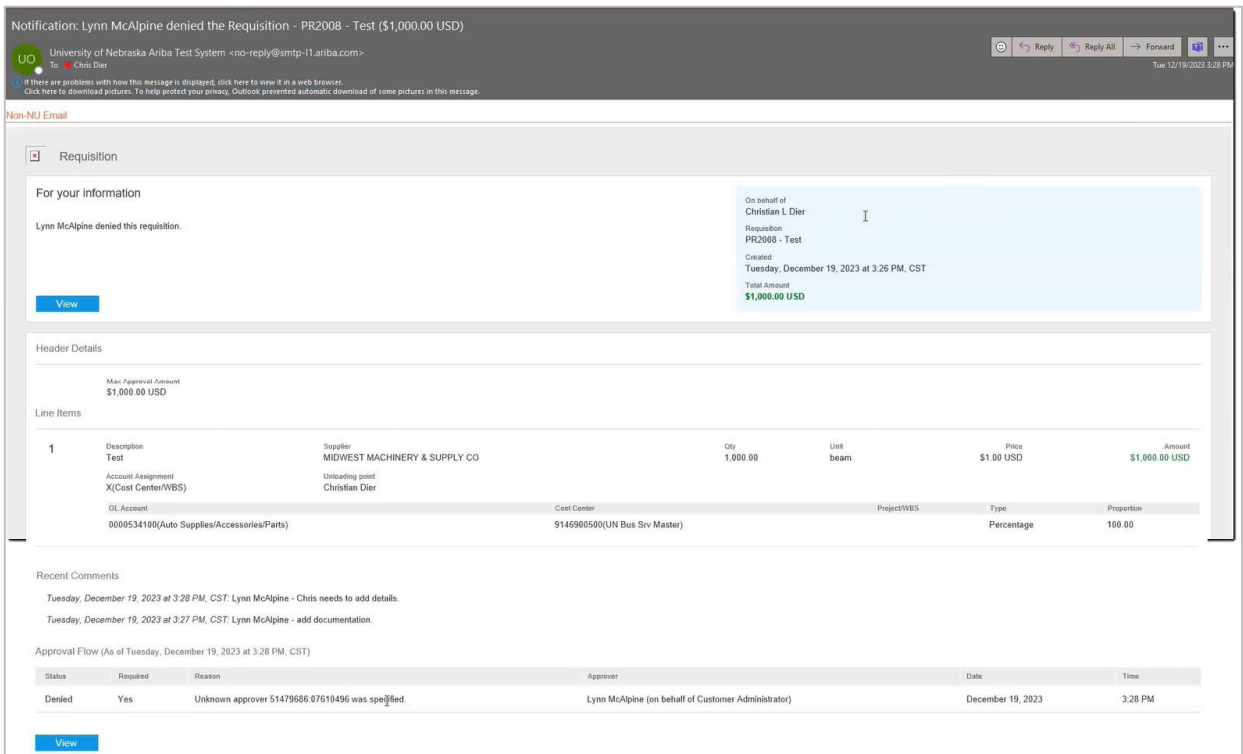
1. To locate a requisition, go to the "Your requests" tab in the Guided Buying home page or, if recently created, go to the "Recent requests" pane on the right-hand side of the same page.
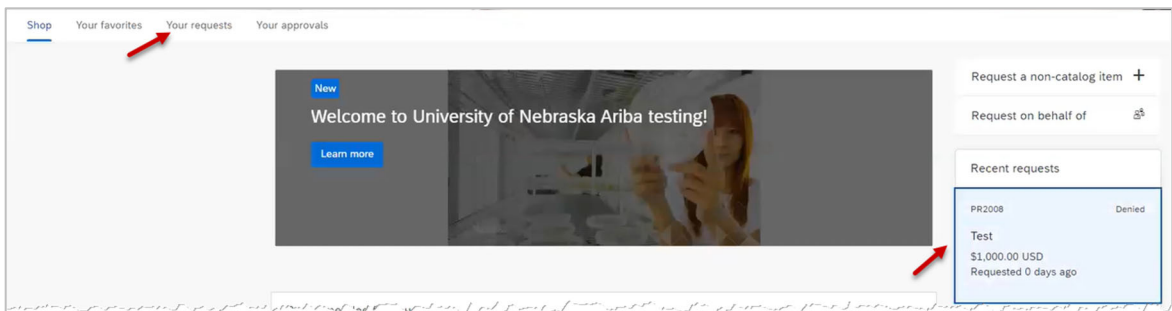
Updated: August 29, 2024

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".

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.