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
- **Comments and Attachments**—Add, edit, or delete comments or attachments without editing a document
- **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](https://ariba.nova.edu) using your email/computer user name and password.
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 (2nd 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.
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.
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.
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.

   ![Image showing drop-down menu for Index/Org]

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

   ![Image showing 'Choose Value for Index/Org' pop up]

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

   ![Image showing drop-down menu for Dept./Program]

   1) Only the Dept./Program matching the index will be shown–Click ‘Select.’

   ![Image showing 'Choose Value for Dept./Program' pop up]
v. Click on the drop down arrow for ‘Activity Code’ and click ‘Search for More.’

![Activity Code dropdown](image)

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

![Select Activity Code](image)

vi. Accounting errors are now cleared.

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

![Ship To dropdown](image)
viii. Click on the ‘Field:’ drop down for more search options.

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

x. Enter search information and click ‘Search.’

xi. Click ‘Select’ next to the correct address.
xii. Manually type in the ‘Floor,’ ‘Room,’ and ‘Phone’ information.

![Image showing 'Floor,' 'Room,' and 'Phone' fields]

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

2. Follow the same steps to update ‘Shipping – Entire Requisition.’

![Image showing 'Shipping – Entire Requisition' form]
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.’
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.

   ![Image of Ariba spend management interface]
   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.)

   ![Image of search results]
   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.


   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.
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.