

Sourcing & Contract Management Quick Reference Guide ST QRG01

Submitting a Service Sheet using Catalogue items

Document Control

Document Control Ref:	ST QRG01
Document Location:	P2P Systems Ariba Training Centre
Document Custodian:	P2P Systems Team

Document Approval

Ricky Athwal SAP Ariba Specialist Sourcing & Contract Management	Scott Copley Sourcing and Contracts Manager Sourcing & Contract Management
---	---

Document Revision History

Version	Date	Revised By	Reviewed By	Amendment Details
1	02/03/2021	Ricky Athwal	Scott Copley	New Document
2				
3				
4				

Contents

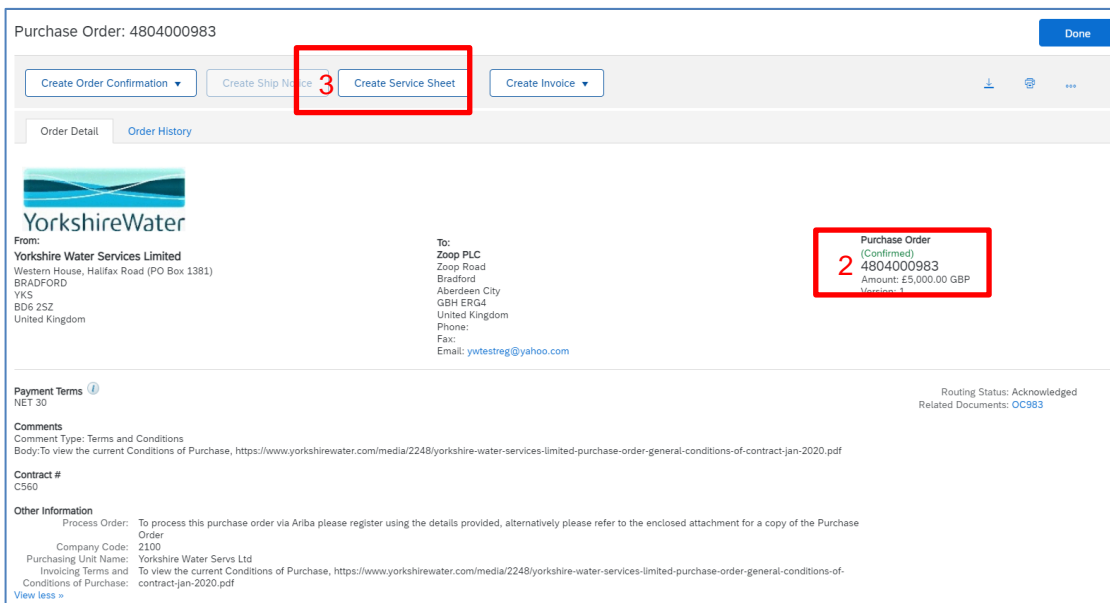
- 1. Introduction..... 3
- 2. Adding items from Catalogue 3
- 3. Adding unplanned items 5

1. Introduction

This guide will show you how to complete and submit a service sheet in your Ariba Network account for Purchase Orders (PO) sent by Yorkshire Water Services Ltd using catalogue items loaded in Yorkshire Waters Ariba Buying solution.

2. Adding items from Catalogue

- 1) Open up the relevant PO
- 2) Ensure the PO is in a confirmed status (if the PO is not in a confirmed status, please submit an Order Confirmation by using the “Create Order Confirmation” option. The “Create Service Sheet” option will be disabled until this step is performed)
- 3) Select “Create Service Sheet”



Purchase Order: 4804000983 Done

Order Detail Order History

YorkshireWater

From: Yorkshire Water Services Limited
Western House, Halifax Road (PO Box 1381)
BRADFORD
YKS
BD6 2SZ
United Kingdom

To: Zoop PLC
Zoop Road
Bradford
Aberdeen City
GBH ERG4
United Kingdom
Phone:
Fax:
Email: ywtestreg@yahoo.com

2 Purchase Order
(Confirmed)
4804000983
Amount: £5,000.00 GBP
Version: 1

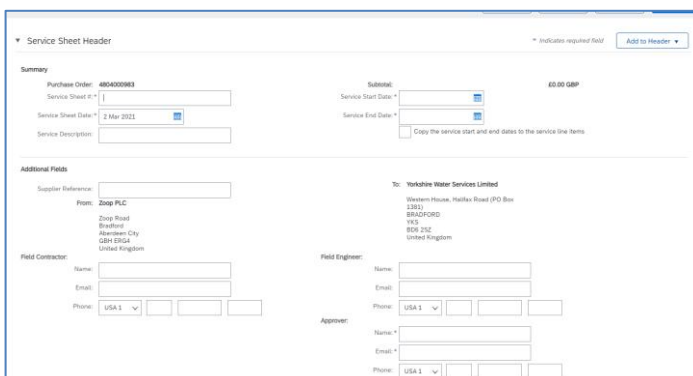
Payment Terms: NET 30 Routing Status: Acknowledged
Related Documents: OC983

Comments
Comment Type: Terms and Conditions
Body: To view the current Conditions of Purchase, <https://www.yorkshirewater.com/media/2248/yorkshire-water-services-limited-purchase-order-general-conditions-of-contract-jan-2020.pdf>

Contract #
C560

Other Information
Process Order: To process this purchase order via Ariba please register using the details provided, alternatively please refer to the enclosed attachment for a copy of the Purchase Order
Company Code: 2100
Purchasing Unit Name: Yorkshire Water Servs Ltd
Invoicing Terms and Conditions of Purchase: To view the current Conditions of Purchase, <https://www.yorkshirewater.com/media/2248/yorkshire-water-services-limited-purchase-order-general-conditions-of-contract-jan-2020.pdf>
[View less](#)

- 4) Complete all the mandatory fields including Service Sheet ID, Service Start/End Date. The approvers details will default to the requestor and this does not need to be changed.



Service Sheet Header * Indicates required field

Summary

Purchase Order: 4804000983 Subtotal: £0.00 GBP

Service Sheet #: 1 Service Start Date:

Service Start Date: 2 Mar 2021 Service End Date:

Service Description:

Copy the service start and end dates to the service line items

Additional Fields

Supplier Reference:

From: Zoop PLC
Zoop Road
Bradford
Aberdeen City
GBH ERG4
United Kingdom

To: Yorkshire Water Services Limited
Western House, Halifax Road (PO Box 1381)
BRADFORD
YKS
BD6 2SZ
United Kingdom

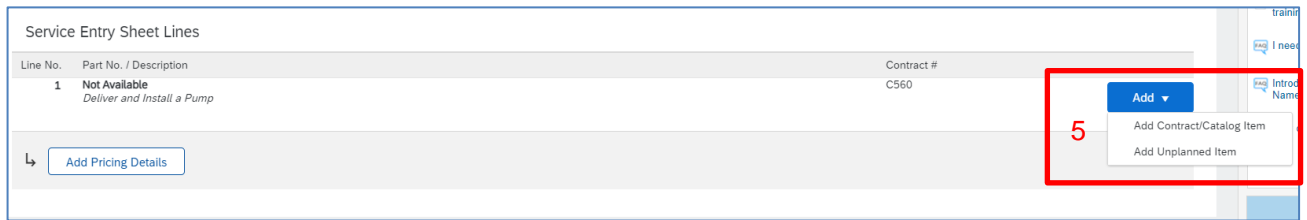
Field Contractor: Name:
Email:
Phone: USA 1

Field Engineer: Name:
Email:
Phone: USA 1

Approver: Name:
Email:
Phone: USA 1

ST QRG01 Supplier Training – Submitting a Service Sheet using Catalogue items

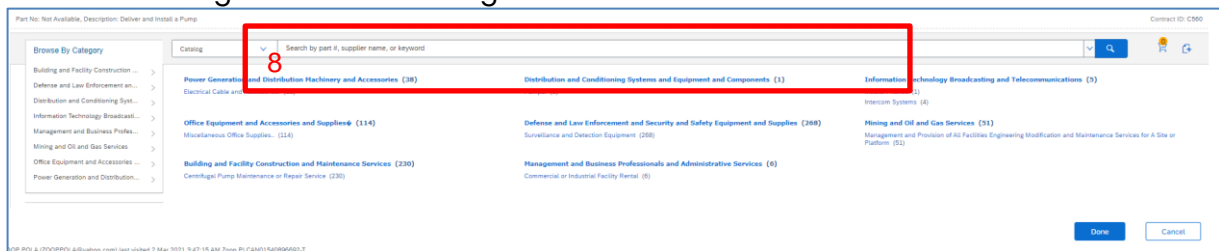
- 5) In the Service Entry Sheet lines section, click on “Add”
- 6) Select “Add Contract/Catalog Item” from the drop-down



- 7) The Catalogue interface will open.
- 8) Use search bar to search for and add goods/services associated with this service sheet as detailed in the response to the Quotation Analysis Form (QAF). You can search by part ID or any keywords. Alternatively, you can search by the categories provided.

- All contractual labour rates (i.e. Mechanical Engineer) will be itemised in the catalogue
- Frequently used assets will be itemised in the catalogue
- All other assets/parts, use the £1 line items provided in the catalogue and amend the quantity to match the price

- 9) To search for multiple part IDs, ensure these are separated by the term “OR”. I.e. enter “Mechanical Engineer OR Labour Engineer”



- 10) Once the relevant catalogue line items have been found, add the quantity and select “Add to Cart”. In the example below, a quantity of 8 hours has been added for an Engineer.



- 11) Repeat the same process for any other catalogue line items you want to add for this service sheet. Once all items have been added to the service sheet, select “Done”.

- 12) These items will be returned in the Service Entry Sheet lines section.

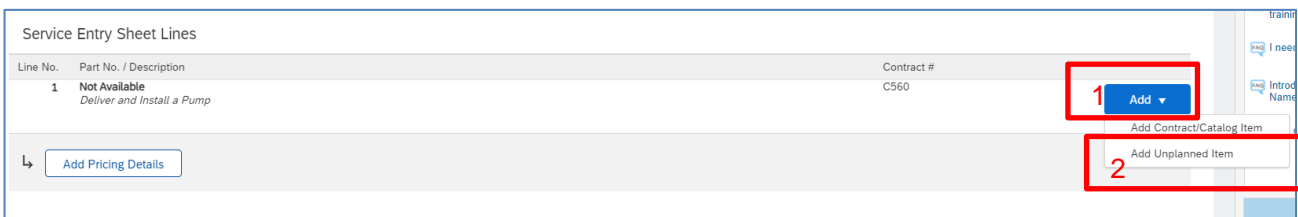
Part No. / Description	Contract #				
Not Available Deliver and Install a Pump	C560				
Include	Part No. / Description	Customer Part #	Type	Item Type	Qty / Unit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CM238-508	Service	Unplanned From Contract	8 HUR
Waste Water Centrifugal Pumps Above 30KW Industrial Pumps Diagnostic Work Technical Engineer charge per hour for Business Hours Monday to Friday 0800-1800					
CONTRACT DETAILS					
Contract #: C560					

ST QRG01 Supplier Training – Submitting a Service Sheet using Catalogue items

- 13) Review the items in the Service Entry Sheet lines section and the overall sub-total of the service sheet. If you are unable to find the items in the catalogue, please follow section 3.
- 14) Once all items have been successfully returned and the sub-total is correct, click Next. The sub-total of the service sheet should match the value of the QAF.
- 15) Review the Service Sheet for correctness. Click Submit.

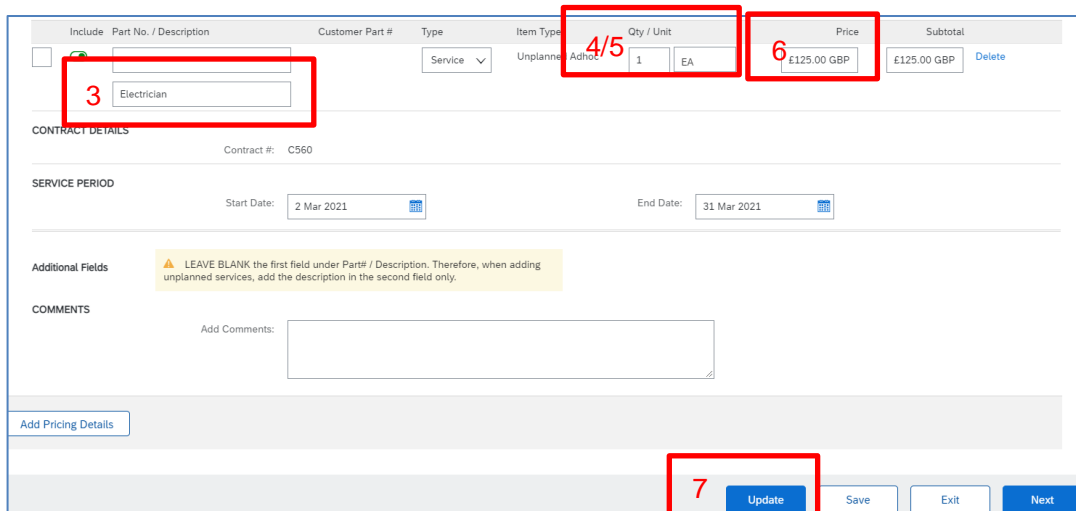
3. Adding unplanned items

- 1) If you are unable to find the relevant items associated with this service sheet, in the Service Entry Sheet lines section, click on “Add”
- 2) Select “Add Unplanned Item”



Line No.	Part No. / Description	Contract #
1	Not Available Deliver and Install a Pump	C560

- 3) Enter a description/part No in the second field
- 4) Enter a Qty
- 5) Enter a Unit of Measure (Note: Each is “EA” and Hour is “HUR”)
- 6) Enter a price
- 7) Click “Update”



Include	Part No. / Description	Customer Part #	Type	Item Type	Qty / Unit	Price	Subtotal
<input type="checkbox"/>	Electrician		Service	Unplanned Adhoc	1 EA	£125.00 GBP	£125.00 GBP

CONTRACT DETAILS
Contract #: C560

SERVICE PERIOD
Start Date: 2 Mar 2021
End Date: 31 Mar 2021

Additional Fields
⚠ LEAVE BLANK the first field under Part# / Description. Therefore, when adding unplanned services, add the description in the second field only.

COMMENTS
Add Comments:

Buttons: Add Pricing Details, Update, Save, Exit, Next

ST QRG01 Supplier Training – Submitting a Service Sheet using Catalogue items

- 8) Review the overall sub-total of the Service Sheet and click Next.
- 9) On the next page, Review the Service Sheet for correctness. Click Submit.

Create Service Sheet

Confirm and submit this document.

Service Sheet Subtotal: £887.36 GBP
SS983
Date: 2 Mar 2021
Final Service Sheet: No
Purchase Order: 4804000983
Subtotal: £887.36 GBP
Service Start Date: 2 Mar 2021
Service End Date: 31 Mar 2021

From
Zoop PLC
Zoop PLC
Zoop Road
Bradford
Aberdeen City
GBH ERG4
United Kingdom

To
Yorkshire Water Services Limited
Kelda Group Limited inclusive of Yorkshire Water, Loop and Keyland
Western House, Halifax Road (PO Box 1381)
BRADFORD
YKS
BD6 2SZ
United Kingdom
Address ID: YWSLTD

END.