# Sourcing & Contract Management Quick Reference Guide ST QRG01

# Submitting a Service Sheet using Catalogue items

# Document Control

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# Document Approval

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# **Document Revision History**

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



# ST QRG01 Supplier Training - Submitting a Service Sheet using Catalogue items

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### 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
Create Order Confirmation   Create Ship No ce 3 Create Service	e Sheet Create Invoice 🔻	± ©
Order Detail Order History		
YorkshireWater From: Yorkshire Water Services Limited Western House, Halifax Road (PO Box 1381) BRADFORD VKS EDB 252 United Kingdom	To: Zoop PLC Zoop Road Bradford Aberdee Lity United Kingdom Phone: Faa: Email: ywtestreg@yahoo.com	Purchase Order (Confirmed) 4804000983 Amout 5,000.00 GBP
Payment Terms 🕧 NET 30		Routing Status: Acknowledged Related Documents: OC983
Comments Comments Body:To view the current Conditions of Purchase, https://www.yorkahirewater.com/media/22/ Contract # Costo	48iyor/shire-water-services-limited-purchase-order-general-conditions-of-contract-jan-	2020.pdf
Other Information         To process this purchase order via Ariba please register using the Order           Company Code:         2100           Purchasing Unit Name:         Vorshine Water Servs Ltd           Invoicing Terms and         To view the current Conditions of Purchase, https://www.yorkshint           Conditions of Purchase:         contract-jan-2020.pdf	e details provided, alternatively please refer to the enclosed attachment for a copy of t rewater.com/media/2248/yorkshire-water-services-limited-purchase-order-general-conc	

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 Hea	ider		* Indicates required field Add to Header •
ummary			
Purchase Order:		Subtotal:	£0.00 GBP
Service Sheet #;*		Service Start Date: *	
Service Sheet Date:*	2 Mar 2021	Sanitos End Date:*	
Service Description		Copy the service start and	end dates to the service line items
	Zoop PAC Zoop Road Brantined Alexandere Chry Olivited Kangdom	Western Hunar, Hallax Roe 1383) BRJZFORD BRZ BRZ BRZ United Kingtone Name	
Name.		Planter,	
Email		Email:	
Phone	USA1 v	Phone: USA 1 V	
		Nartin: *	
		Email:*	



#### 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

Service Entry Sheet Lines		trainir I need
Line No. Part No. / Description	Contract #	<u>`</u>
Not Available     Deliver and Install a Pump      Add Pricing Details	C560 Add  Add  Add  Add Control Add Unpla	ract/Catalog Item

- 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"

rowse By Category	Catalog Search by part II, supplier name, or keyword		v 🔍 🖗 🖻
elense and Law Enforcement an >	Power Generation and Distribution Hackinery and Accessories (38) Electrical Cable and	Distribution and Conditioning Systems and Equipment and Components (1)	Information echnology Broadcasting and Telecommunications (5)
istribution and Conditioning Syst >			Intercom Systems (4)
formation Technology Broadcasti	Office Equipment and Accessories and Supplies® (114)	Defense and Law Enforcement and Security and Safety Equipment and Supplies (268)	Mining and Oil and Gas Services (51)
anagement and Business Profes >	Miscellaneous Office Supplies (114)	Surveillance and Detection Equipment (268)	Management and Provision of All Facilities Engineering Modification and Maintenance Services for A Site or Platform (51)
flice Equipment and Accessories >	Building and Facility Construction and Maintenance Services (230)	Management and Business Professionals and Administrative Services (6)	
over Generation and Distribution >	Centrifugal Pump Maintenance or Repair Service (230)	Commercial or Industrial Facility Rental (6)	

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 Availa Deliver ar	able nd Install a Pump			C560	
Incl	ude Part No. / Description	Customer Part #	Туре	Item Type	Qty / Unit
	CM238-508		Service 🗸	Unplanned From Contract	8 HUR (i)
	Waste Water Centrifugal Pumps A	bove 30KW Industrial Pumps Dia	gnostic Work Technical B	Engineer charge per hour for Business I	Hours Monday to Friday 0800-1
ONTRAC	T DETAILS				
	Contrac	t #: C560			

Data Classification: Private



#### 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"

Service Entry Sheet Lines		trainir I need
Line No. Part No. / Description	Contract #	
1 Not Available Deliver and Install a Pump	C560	Add  Add  Add  Add  Add Contract/Catalog Item
Add Pricing Details		2 Add Unplanned Item

- 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.		Customer Part #	Type Service	ltem Type Unplanne	Adhoe /5	EA	6 £125.00 G	Price BP	Subtotal £125.00 GBP	Delete
CONTRACT DETAILS	Contract #: C	560								
SERVICE PERIOD	Start Date:	2 Mar 2021			End Dat	e: 31 Mar	2021			
Additional Fields	LEAVE BLANK the first fi unplanned services, add the	ield under Part# / Descript description in the second	tion. Therefore, wher field only.	n adding						
COMMENTS	Add Comments:					1				
dd Pricing Details										
						7	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		Previous	Save	_9[	Submit	Exit
Confirm and submit this document.						
Service Sheet 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	Subtotal: £887.36 GBP					
From Zoop PLC Zoop Road Bradford Aberdeen City GBH ERG4 United Kingdom	To Yorkshire Water Services Limited Keida Group Limited inclusive of Yorkshire Water, Loop and Keyland Western House, Halifax Road (PO Box 1381) BRADFORD YKS BD6 252 United Kingdom Address ID: YWSLTD					

END.