

# Unplanned Services Guide

SAP Ariba 



**SAP**



# Introduction

The purpose of this document is to provide the information suppliers need to effectively transact with BHP via the Ariba Network. This document provides step by step instructions, procedures and hints to facilitate a smooth flow of unplanned service orders between BHP and supplier.

- This guide will cover the Unplanned Service order process where the item is:
  - a) selected from a Catalog
  - b) selected from a list of items in a Contract
  - c) added under a contract when the list is not provided for selection ; and
  - d) added under a limit Purchase Order
- For information on the Planned Service process please see the other Service Order Guide



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## Resources Available:

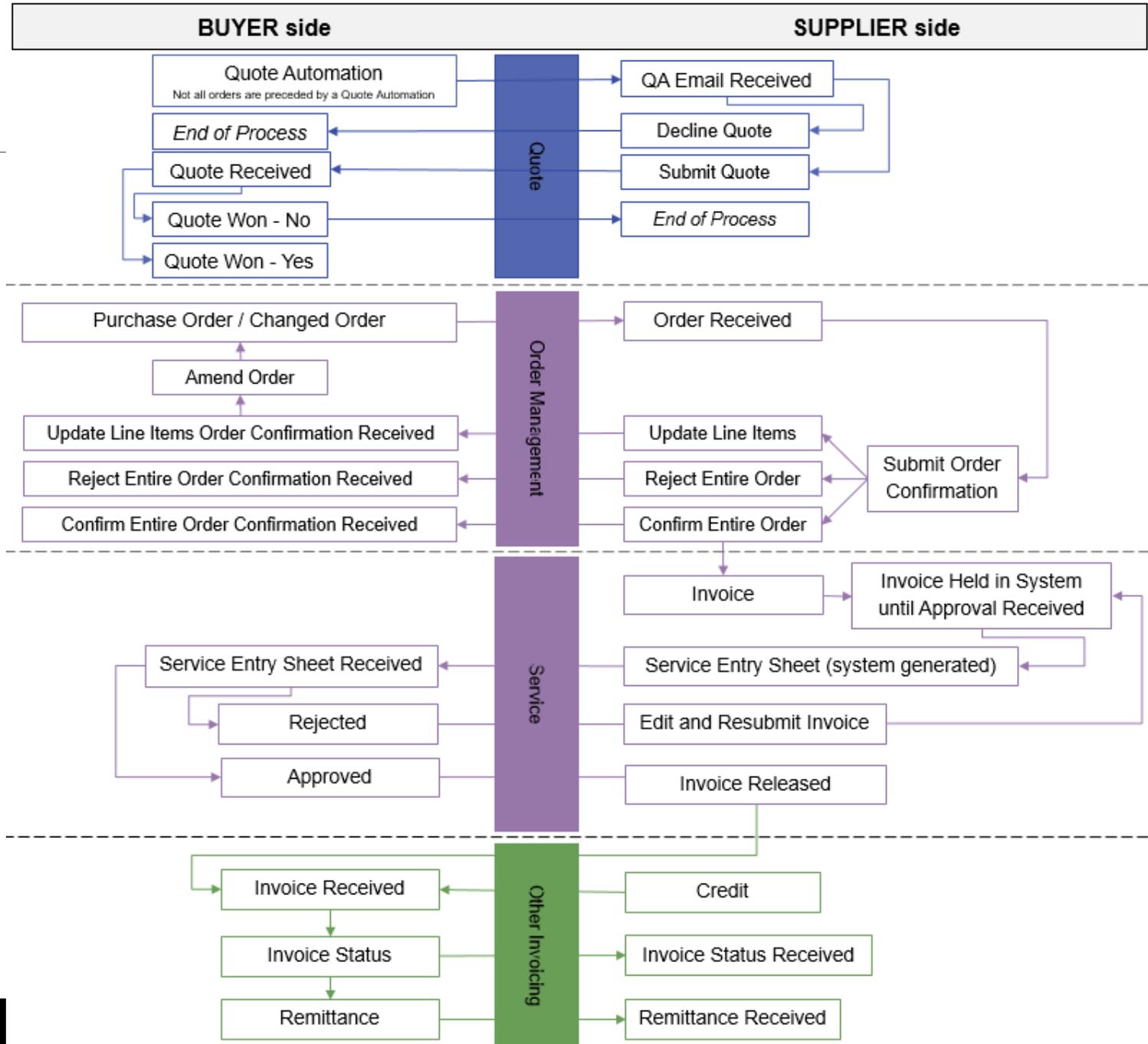
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# Process Workflow

**Quote** – Covered in the Quote Automation Guide

**Order Management and Service** – Covered in the Service Order Guide

**Other Invoicing** – Covered in the Material Invoice Guide



# Inbox – Received Orders

The **Orders and Releases** category displays a summary of all the purchase orders sent from buyers.

**Note (N):** The columns can be sorted into alphabetical (A-Z or Z-A) or numerical (0-9 or 9-0) order by clicking on the column heading.

The screenshot shows the Ariba Network interface. The 'INBOX' tab is selected. The 'Orders and Releases' section is active, displaying a table of 14 orders for 'Customer: Demo Buyer - TEST'. The table has the following columns: Type, Order Number, Ver, Ship To Address, Amount, Date, Order Status, Settlement, Amount Invoiced, Revision, and Actions. Two orders are visible:

Type	Order Number	Ver	Ship To Address	Amount	Date	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351	1	Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions
Order	PO12343	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions

The **Ver.** is the version number of the order. 1 = the original order, 2 = changed order and so on

The **Amount Invoiced** is the total amount invoiced to date

The **Order Number** is the buyers Purchase Order Number

The **Order Status** is the current status of the order, e.g. New, Confirmed, Invoiced

The **Actions** dropdown allows document creation without opening the order

# Open the Purchase Order

1. Click **Inbox** tab on the Dashboard.
  - Screen displays: **Orders and Releases**
2. Click the **Order Number** to open the order.
  - Screen displays: **Purchase Order**
3. View the Purchase Order.

The screenshot shows the Ariba Network interface. At the top, there is a navigation bar with 'HOME', 'INBOX', 'OUTBOX', and 'REPORTS'. The 'INBOX' tab is highlighted with a red circle and the number 1. Below the navigation bar, there is a section for 'Orders and Releases' with a search filter and a table of orders. The table has columns for Type, Order Number, Ver, Ship To Address, Amount, Date, and Order Status. The first row is highlighted with a red circle and the number 2, showing an order with the number 'PO12351'. To the right of the table, there is a detailed view of the purchase order for 'Purchase Order: 4540606888', which is highlighted with a red circle and the number 3. This view includes sections for 'Order Detail', 'Order History', 'Payment Terms', 'Contact Information', 'Supplier Address', 'Incoterms Information', and 'Ship All Items To'.

**Orders and Releases (14)**

Type	Order Number	Ver	Ship To Address	Amount	Date	Order Status
Order	PO12351		Some Department of My Company, sydney, NSW, Australia	\$70,470.00 AUD	15 Aug 2016	New

**Purchase Order: 4540606888**

**Order Detail**

**From:** South32 Cannington P/L  
Perth WA 6000  
Australia  
Phone: +61 ( ) U830  
VAT Reg: 48 125 530 967

**To:** S32 [redacted] TEST  
ABC 456  
Australia  
Phone:  
Fax:  
Email: [redacted]

**Payment Terms:** Within 30 days Due net

**Contact Information:** South32-Contact  
Supplier Address: [redacted]  
Australia  
Phone: + ( ) [redacted]

**Incoterms Information:** Incoterm Code: CPT ( Carriage Paid To )  
Incoterm Location: LINFOX PICKUPS PH1800781793

**Ship All Items To:** Cannington NB Main Warehouse  
Ship To Code: U801  
Location Code: U801

**Bill To:** South32 Cannington P/L  
Perth WA 6000  
Australia  
Phone: +61 ( ) U830  
buyerID: U830

# View Unplanned Service – Line Item

- 1) Click **Show Item Details** to see all line item details.
  - The total value of the PO will be shown
- 2) Click **Details** to see individual Line Level details. Where no Child Line is shown this is an unplanned service with a \$value that is limited.
  - Click Done to return to the **Inbox**.

## Reviewing a Purchase Order

Each Purchase Order that comes into the system should be reviewed to:

- Validate the information contained within the PO
- Ensure that the details of the order are correct
- Pricing on PO should be the same as contract price or quote price

**Line Items**
Page 1
Show Item Details

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	
10			Service			1.0 (PCE)	11 Sep 2017 12:00:00 +09:30	\$1,000.00 AUD	\$1,000.00 AUD	\$100.00 AUD	<a href="#">Details</a>

Description: Unplanned sample

Order submitted on: Monday 11 Sep 2017 1:07 PM GMT+10:00  
 Received by Ariba Network on: Monday 11 Sep 2017 1:07 PM GMT+10:00  
 This Purchase Order was sent by South32 International Investment Holdings Pty Ltd - TEST AN01025140870-T and delivered by Ariba Network

Service Sheet Required.

Sub-total: \$ 1,000.00 AUD  
 Est. Total Tax: \$ 100.00 AUD  
 Est. Grand Total: \$ 1,100.00 AUD

Create Order Confirmation
Create Service Sheet
Create Invoice

Hide
Print
Download PDF
Export cXML
Download CSV
Resend

Done

**Ship All Items To**

Gregory Mine  
 Lillyvale Road,  
 Via Emerald QLD 4740  
 Australia  
 Ship To Code: CY01  
 Location Code: CY01

**Bill To**

BM Alliance Coal Ops PL  
 71 Eagle Street  
 Brisbane QLD 4000  
 Australia  
 Phone: +61 ( ) A700  
 buyerID: CY00

**Deliver To**

**Line Items** Show Item Details

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	Customer Location	
10			Service			1.0 (PCE)	4 Jul 2018	\$100,000.00 AUD	\$100,000.00 AUD	\$10,000.00 AUD		<a href="#">Details</a>

Description: test

Order submitted on: Wednesday 4 Jul 2018 8:00 PM GMT+08:00  
 Received by Ariba Network on: Wednesday 4 Jul 2018 8:57 AM GMT+08:00  
 This Purchase Order was sent by BHP Group Operations - TEST AN01015189973-T and delivered by Ariba Network.

Service Sheet Required.

Sub-total: \$ 100,000.00 AUD  
 Est. Total Tax: \$ 10,000.00 AUD  
 Est. Grand Total: \$ 110,000.00 AUD



# Order Confirmation

- When a new order is received into Ariba, you will be required to create an Order Confirmation
- **The Order Confirmation is Mandatory**
- The Confirmation Number (#) is your reference number, it can be any word number or combination of your choice. Max length is 20 characters
- There are 3 types of Order Confirmation; a Confirmation can be created to either confirm, update or reject the order:
  - 1) **Confirm Entire Order:** used to confirm all line item details of the order as is.
  - 2) **Update Line Item:** used to update details of the order prior to invoicing, e.g. price, date etc.  
Its important to confirm the change order before invoicing.
    - 1) **Reject Entire Order:** used to reject the order if it cannot be fulfilled
- Any field with an \* is a mandatory field and a value is required to be entered



The confirmed PO must be the quantity and value of the actual service that is rendered.

If any changes are required after the actual service is rendered, create another Order Confirmation and Update Line Items to propose changes to the order.

# Create the Order Confirmation

1. **Inbox** -> Orders and Releases
2. Located and click the **Order Number** to open the order.
- Screen displays: Purchase Order
3. View the Purchase Order.

HOME **INBOX** 1 CATALOGS REPORTS CSV Documents Create

Orders and Releases Time & Expense Sheets Early Payments Scheduled Payments Remittances Inquiries Notifications More...

Orders and Releases

Orders and Releases Items to Ship

Search Filters

Orders and Releases (14)

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351		Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions
Order	PO96743	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions

Create Order Confirmation 4 Create Ship Notice Create Invoice Hide Print Download PDF Export cXML Download CSV Resend

Confirm Entire Order

Update Line Items

Reject Entire Order

# Create Order Confirmation

1. Click **Create Order Confirmation** and select option.
  - Drop down box displays available options:
    - **Confirm Entire Order**
    - **Update Line Items**
    - **Reject Entire Order**
  - Screen displays: **Order Confirmation**

Order Confirmation: Conf7374

Confirmation #: Conf7374  
Notice Date: 4 Jul 2018  
Purchase Order: 4505987374  
Est. Delivery Date: 5 Jul 2018

Line #	Part #	Customer Part #	Revision Level	Qty (Unit)	Need By	Ship By	Unit Price	Subtotal	Customer Location	Tax
10				1.0 (PCE)	5 Jul 2018		\$100,000.00 AUD	\$100,000.00 AUD		\$10,000.00 AUD

Description: test

Current Order Status:  
1 Confirmed As Is (Estimated Completion Date: 5 Jul 2018 )

# Order Confirmation – Confirm Entire Order

- **Confirm Entire Order:** is used when all details on the order are complete and correct

5. Enter **Confirmation#**.

6. Click **Next**.

- Screen displays: Review Order Confirmation

**7** **Review** Confirmation and click **Submit**.

- Screen returns - Purchase Order. Order Status has changed to Confirmed

Confirming PO Exit Next

1 Confirm Entire Order

2 Review Order Confirmation

▼ Order Confirmation Header \* Indicates required field

Confirmation #  **5**

Associated Purchase Order #

Customer: BHP Group Operations ⚠ BHP Group Operations requires that you fully confirm line items before you can add them to ship notices, service sheets, or invoices. If you change or reject a line item, it cannot be added to another document.

Supplier Reference:

**ADDITIONAL INFORMATION**

Est. Completion Date:

Comments:

**Line Items**

Line #	Part #	Customer Part #	Revision Level	Qty (Unit)	Need By	Unit Price	Subtotal	Tax	Customer Location
10				1.0 (PCE)	3 Sep	\$6,220.00 USD	\$6,220.00 USD	\$777.50 USD	PT07

Description:

▶ **Schedule Lines**

Current Order Status:

**1.0 Confirmed As Is** (Estimated Completion Date: 3 Sep )

Exit Next **6**

# Order Confirmation – Update Line Items

## Update Item Status.

8. Enter a **Confirmation #**
  - Screen returns – Order Confirmation  
Click **Next**.
  - Screen displays: **Review Order Confirmation**
9. Select 'Confirm' radio button and then optionally select the 'Details' button
10. Click **Submit**.
  - Screen returns - **Purchase Order. Order Status has changed to Partially Confirmed**

Confirming PO Exit Next

8

1 Update Item Status

▼ Order Confirmation Header \* Indicates required field

2

Review Confirmation

Confirmation #:

Associated Purchase Order #:

Customer: BHP Group Operations ⚠ BHP Group Operations requires that you fully confirm line items before you can add them to ship notices, service sheets, or invoices. If you change or reject a line item, it cannot be added to another document.

Supplier Reference:

---

**ADDITIONAL INFORMATION**

Est. Completion Date:

Comments:

---

**Line Items**

Line #	Part #	Customer Part #	Revision Level	Qty (Unit)	Need By	Unit Price	Subtotal	Tax	Customer Location
10				1.0 (PCE)	3 Sep	\$6,220.00 USD	\$6,220.00 USD	\$777.50 USD	PT07

Description:

► Schedule Lines:

Unconfirm

Confirm

Reject - Please specify a reason:

9

10

# Order Confirmation –Update Line Item

- Enter updated information.
- Click **Ok**.
- Screen returns – Order Confirmation
- Click **Next**.
- Screen displays: Review Order Confirmation
- Click **Submit**.
- Screen returns - Purchase Order. Order Status has changed to Partially Confirmed

New Order Status **4 Rejected**

Comments:

New Order Status **4 Confirmed**

Est. Completion Date:

Unit Price:

Price Unit Quantity:\*

Unit Conversion:\*

Price Unit:\*

Supplier Part:

Auxiliary Part ID:

Manufacturer Part ID:  
Manufacturer Name:

Comments:

Description: Shock Absorber Rebuilds - CD5  
Pricing Description:

Subtotal: ⓘ \$6,976.48 AUD

## Rejected:

Use to Reject a portion or a line of a multi-lined order. Enter a Rejection Reason and a Comment

## Confirmed:

Use for all other updates/changes required to the order:

- Unit Price
- Comments

# Order Confirmation –Reject Entire Order

11. Enter **Confirmation #**.

12. Enter **Comments** for the rejection. (Include detailed notes advising reason for rejection).

13. Click **Reject Order**.

➤ Screen returns - Purchase Order. Order Status has changed to Rejected

- Use the Reject if;
  - You can no longer fulfil the order
  - The order was not intended for your company

REJECT ENTIRE ORDER

Order Confirmation Number:

11 Confirmation #.\* 756451

12 Comments.\* Comments regarding the rejection

13 Reject Order Cancel

METSO AUSTRALIA LIMITED  
Email: minerals.credit.aus@metso.com



# Service Claims

- The Service Entry Sheet is the claim for the actual service work carried out . Service Sheet will be reviewed once submitted to BHP and either Approved or Rejected
- There are two methods to begin the payment process for Service Orders. As a general Rule Method 1 will be adopted. Method 2 will only be allowed by approved exception

**Method 1: Create invoice first (AutoFlip INV->SES)**

Supplier creates the Invoice and submits the invoice, it auto generates a service entry that is submitted to BHP for approval. On approval of the SES the invoice is released and sent to BHP.

**Method 2: Create the Service Sheet first**

Used where BHP have directed that you can create a standard Service Sheet to be submitted to BHP for approval but to not create an invoice in Ariba. For example:

- *You receive an RCTI (Recipient Created Tax Invoice from BHP*
- *You create and send a manual invoice outside Ariba and email it to BHP*



# Service Invoice

- A Service Invoice is a claim for the services carried out and is created and held in the system until approval is received from BHP
- An Invoice requires an attachment of supporting documentation (e.g. signed time sheet, invoice, service report)
- Can only be created from 'Confirmed' Service Order lines
- Multiple invoices can be created against the same PO line up to the quantity/value available on that PO line
- Maximum of 200 lines (including the Parent Line) per Invoice



# Method 1 – Invoice First

- A **Service Invoice** is a claim for the services carried out and is created and held in the system until approval is received from BHP. It is created for **confirmed** Service Orders only and must have an attachment of supporting documentation (e.g. signed time sheet, invoice, service report)
- Using this method you create an invoice and Ariba creates a service sheet for you. The invoice is sent after BHP approves the service sheet.
  - *Multiple invoices can be created against the same PO line up to the quantity/value available on that PO line*
  - *Maximum of 200 lines (including the Parent Line) per Invoice*

**Step 1:** Receive and confirm Service Order

**Step 2:** Provide service to BHP

**Step 3:** Create & Submit Service Invoice (the system will hold this, until the Service Entry is Approved)

**Step 4:** Service Entry Sheet is Approved

**Step 5:** Ariba Network will release the Invoice (Status of Pending Approval) & send to BHP to progress through the invoice reconciliation process.

# Invoice – Header Level

7. Enter your invoice number into the **Invoice#** field

8. **Add/Update** to create the item to invoice.

9. **Attachments** for Service Invoices are **Mandatory**. See next page for instructions

➤ The attachment is one of the following:

- Signed job card
- Signed time sheet
- Signed proof that the service was rendered
- A signed copy invoice

➤ **Error message if an Attachment is not added:** *This invoice auto-generates a service sheet. Your customer requires attachments for service sheets. You must upload at least one attachment before submitting this invoice*

Create Invoice Update Save Exit Next

▼ Invoice Header \* Indicates required

Add to Header ▼  
 Shipping Documents  
 Comment  
Attachment

**7**

Summary

Purchase Order: [blurred]  
 Invoice #:   
 Invoice Date: [blurred]  
 Supplier Tax ID: [blurred]  
 Remit To: [blurred]

Subtotal: \$0.00 USD  
 Total Tax: \$0.00 USD  
 Amount Due: \$0.00 USD

**9**

Payment Term

Discount or Penalty Term(days): 60 Percentage(%): 0.000  
 Within 60 days Due net

Supplier: [blurred] Customer: **BHP Group Operations** View/Edit Addresses  
 Melbourne Victoria  
 Australia  
 Email:  View/Edit Addresses

Bill From: [blurred]

Supplier ID Number: [blurred]

Supplier VAT Customer VAT  
 Supplier VAT/Tax ID: [blurred] Customer VAT/Tax ID: 116303

Add to Header ▼

Line Items 0 Line Items, 0 Included, 0 Previously Fully Invoiced

No.	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit	Unit Price	Subtotal
<input type="checkbox"/>	10				Valve storage fee FY18...						

Add/Update ▼

↳ Line Item Actions ▼ Delete Reset Tax from PO

Turn on Error Dump ⓘ  
 Hide/Show XML

Update Save Exit Next

# Create the Invoice

1. Click **Inbox** tab on the Dashboard
  - Screen displays the list of Orders and Releases
2. Click the **Order Number** to open the order
  - Screen displays the Purchase Order
3. Click **Create Invoice & select Standard Invoice**
  - Screen displays the Select Item

HOME **INBOX** 1 CATALOGS REPORTS CSV Documents Create

Orders and Releases Time & Expense Sheets Early Payments Scheduled Payments Remittances Inquiries Notifications More...

Orders and Releases

Orders and Releases Items to Ship

Search Filters

Orders and Releases (14)

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	<b>PO12351</b>		Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions
Order	PO96743	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions

Create Order Confirmation Create Service Sheet **Create Invoice** 3 Pri

Standard Invoice

Line-Item Credit Memo

Order Detail Order History

# Invoice – Create Lines

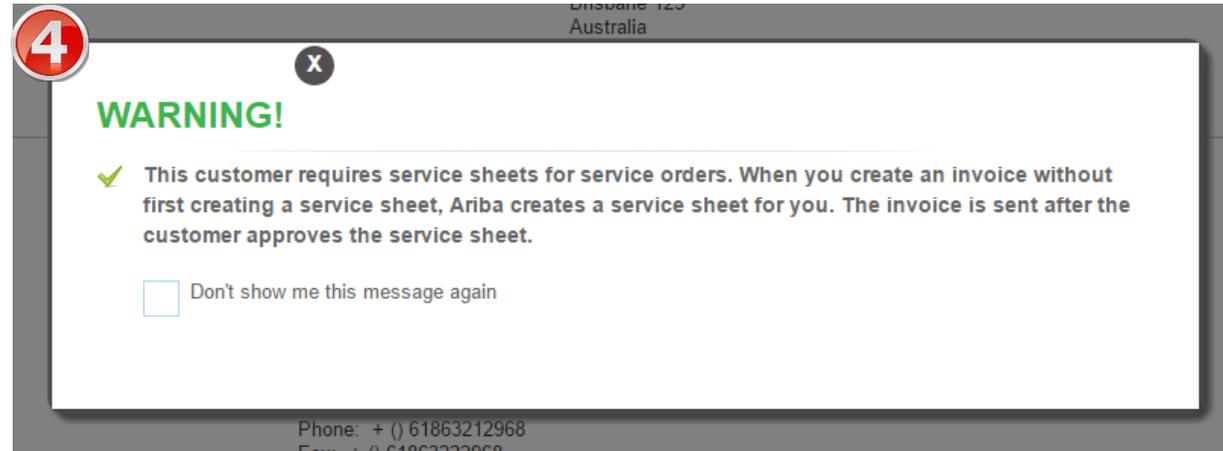
4. The first time this option is selected a **WARNING! pop up** box will appear.

- Read the message
- Tick the box 'Don't show me this message again'
- Close by clicking the X

4. Select the parent line to be invoiced (reminder: only one parent line per claim)

5. Click **Next** to take selected parent line

- Screen displays: **Create Invoice**



Select Item to Create Invoice with Auto-Generated Service Sheet Next Exit

Line Items

Line #	Part ID / Description
<input checked="" type="radio"/> 10	 Labour Hire NT
<input type="radio"/> 20	 Labour Hire OT

 Service Sheet Required.

Next Exit

6

# Invoice – Add/Update a Catalog /Contract item

- Each Unplanned Service Invoice requires 'Child Lines' to be added

12. To add Child Lines to the Invoice;
  - **Click Add/Update**
  - **Select Add Contract/Catalog Item**

13. Whenever a ContractID is shown you can either
  - a) Select from the Items available or
  - b) Create a Non-Catalog item by entering a description. This description and price should be the same as the contract agreed information.

Line Items 0 Line Items, 0 Included, 0 Previously Fully Invoiced

**Insert Line Item Options**

Retail Details  Tax Category:

Discount  Informational Pricing

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
30				PROJECT LABOUR					

Line Item Actions:

Create Service Sheet: Add Item

Part No: null, Description: Punchin

**13** Contract Number → Contract ID: 5600075907

# Invoice – Add Catalog /Contract item

➤ **Browse** the Catalog using categories to find the correct item to add

1. Select from the listed items  
➤ *Update Quantity for each item*
2. **Add to Cart** selected items
3. Click **DONE** when all items have been selected.

The screenshot displays the 'Create Service Sheet: Add Item' interface in SAP Ariba. The top section shows the title and 'Done'/'Cancel' buttons. Below, the 'Part No: null, Description: Punchin' and 'Contract ID: 5600075907' are visible. A 'Browse By Category' sidebar on the left lists 'Maintenance, Repair and Operati...' and 'Services'. The main area shows two category options: 'Maintenance, Repair and Operations (10)' and 'Services (10)'. The 'Services (10)' category is selected, leading to a search results page for 'Services'. The results show '10 item(s) found' with a 'Sort by: Relevance' dropdown. Two items are listed: 'Team Lead-Day-Extra hrs-Wed to Fri' and 'Team Lead-Day-PH-Wed to Fri'. The first item is highlighted with a blue star '1'. Its price is '\$89.60 AUD / hour' and it has a quantity of '1'. The 'Add to Cart' button for this item is highlighted with a blue star '2'. The second item is also listed with a price of '\$127.10 AUD / hour' and a quantity of '1'. A blue star '3' highlights the 'Done' button at the top right of the results page.

# Invoice – Add Non-Catalog item

- Select **ADD CONTRACT/CATALOG ITEM**
- In some instances there may be a ContractID but no detailed items available for selection

15. Select **Create a NON-CATALOG item** .

- Add **Non-Catalog Item** by entering details into the provided fields.

Create Service Sheet: Add Item

Part No. null, Description: Single Service Item

Contract ID →

Browse By Category

Search by part #, supplier name, or keyword

No results found for , please revise your search

- or -

Create a Non-Catalog Item

**Important Note:** Include clear detail for approvers to verify that this is correct. If this item is on contract but not available for selection, you must still use the contract description and price to prevent rejection of invoice/SES

Create Service Sheet: Add Non-Catalog Item **15**

Full Description: \*

Commodity Code: \* (no value) ▾

Quantity:

Unit of Measure: each ▾

Price: \* \$0.00 USD

Amount: \$0.00 USD

Update Amount

Supplier Information

Supplier Part Number:

# Invoice – Add Unplanned Item

- Unplanned Items are created where the Purchase Order
  - has a maximum \$Value
  - No ContractID reference

- In this case you will have the option to Add Unplanned Item at the line level.

16. Enter the details of the service that was provided :
- Description,
  - Quantity
  - Unit of Measure
  - Unit Price.

- Select the line for inclusion in the invoice.

**Ship All Items To**

Gregory Mine  
Lillyvale Road,  
Via Emerald QLD 4740  
Australia  
Ship To Code: CY01  
Location Code: CY01

**Bill To**

BM Alliance Coal Ops PL  
71 Eagle Street  
Brisbane QLD 4000  
Australia  
Phone: +61 ( ) A700  
buyerID: CY00

**Deliver To**

**Line Items** [Show Item Details](#)

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	Customer Location
10			Service			1.0 (PCE)	4 Jul 2018	\$100,000.00 AUD	\$100,000.00 AUD	\$10,000.00 AUD	

Description: test

Order submitted on: Wednesday 4 Jul 2018 8:00 PM GMT+08:00  
 Received by Ariba Network on: Wednesday 4 Jul 2018 8:57 AM GMT+08:00  
 This Purchase Order was sent by BHP Group Operations - TEST AN01015189973-T and delivered by Ariba Network.

Service Sheet Required

Sub-total: \$100,000.00 AUD  
 Est. Total Tax: \$10,000.00 AUD  
 Est. Grand Total: \$110,000.00 AUD

[Add](#)

[Add Contract/Catalog Item](#)

[Add Unplanned Item](#)

**Service Entry Sheet Lines**

Line #	Part # / Description	Type	Item Type	Qty / Unit	Price	Subtotal
10	Unplanned item add	Service	Unplanned Adhoc	1 EA	\$1,254.99 AUC	\$1,254.99 AUC

Additional Fields:

COMMENTS:

# Complete the invoice

14. Once the Line Items have been created for the invoice you will notice

- a) The **Sub-Total and Total** of the Invoice is updated to the value of all added lines
- b) You must now enter **Service Start and End Dates**.
- c) **Select Update**
- d) Click on **NEXT** this will take you to the **Invoice Summary**
- e) **Review Invoice & click Submit to auto-generate and send the SES**

## Create Invoice

[Update](#)[Save](#)[Exit](#)[Next](#)

!Please correct the following errors and resubmit

### ▼ Invoice Header

\* Indicates required field

[Add to Header ▼](#)

#### Summary

Purchase Order: 4506744016

Invoice #:

!The invoice number can only contain upper case characters from A-Z, 0-9, and \_.

Invoice Date: ⓘ 5 Jul 2018

Supplier Tax ID: 0001219023

Remit To: SCORE VALVES TRINIDAD AND TOBAGO LTD

N/A  
Trinidad and Tobago

Subtotal:	\$38.80 USD
Total Tax:	\$4.85 USD
Amount Due:	\$43.65 USD

[View/Edit Addresses](#)

Service Start Date: \*

Service End Date: \*

#### Payment Term

Discount or Penalty Term(days): 60 Percentage(%): 0.000

Within 60 days Due net

Supplier: SCORE VALVES TRINIDAD AND TOBAGO LTD

N/A  
Trinidad and Tobago

Customer: BHP Group Operations

[View/Edit Addresses](#)

Melbourne Victoria  
Australia

Email:

# Invoice – Header Level cont.

**10** An attachment is required for all Service Order Invoices

11. Click on **Add to Header** and select **Attachment**.

➤ The Attachments section is displayed;

1) Click on **Choose File**.

**2** **Browse** your computer files.

**3** Select and click on **Open**.

4) Click on **Add Attachment**.

- Multiple files can be attached
- Max **10mb** in total

Note: Do NOT attach a duplicate copy of the invoice.

A screenshot of a dropdown menu titled 'Add to Header'. The menu is open, showing three options: 'Shipping Documents', 'Comment', and 'Attachment'. The 'Attachment' option is highlighted with an orange border. A red circle with the number '11' is positioned to the right of the dropdown.

A screenshot of the 'Attachments' section. It displays the text 'The total size of all attachments cannot exceed 10MB' and a 'Remove' link. Below this, there is a 'Choose File' button (highlighted with an orange border) and the text 'No file chosen'. To the right is an 'Add Attachment' button (highlighted with an orange border). A blue star icon with the number '1' is next to the 'Choose File' button, and a blue star icon with the number '4' is next to the 'Add Attachment' button.

A screenshot of the 'Attachments' section showing a table with one row of data. The table has columns for 'Name', 'Size (bytes)', and 'Content Type'. The row contains the file 'test.pptx' with a size of 2775322 bytes and content type 'application/vnd.openxmlformats-officedocument.presentationml.presentation'. The row is highlighted with an orange border. Below the table is a 'Delete' button.

Name	Size (bytes)	Content Type
test.pptx	2775322	application/vnd.openxmlformats-officedocument.presentationml.presentation

Please note that attachments must comply with these specifications:

- File must be < 10MB
- Filename must have less than 40 characters total
- Filename must not include special characters shown below:
- Á á é É í í ó Ó ú Ú Ñ ñ & - ' ° a \ / " \$ . ~ # ( ) û [ ] Ç



# Method 2 – Service Sheet First

**Create the Service Sheet first; the Service Sheet will be submitted to the buyer for approval. Invoices are to be submitted separate from Ariba**

**Option 1 – Create a Service Sheet first (Once service has been rendered supplier can submit a SES on the Ariba Network)**

Step 1: Receive and Confirm Service Order

Step 2: Provide Service

Step 3: Create & Submit Service Sheet

Step 4: Approval Received from BHP

*Step 5: Create & Submit Invoice outside of Ariba*

# Create the Service Sheet

1. Click **Inbox** tab on the Dashboard.
  - Screen displays: Orders and Releases
2. Click the **Order Number** to open the order.
  - Screen displays: Purchase Order
3. Click **Create Service Sheet**.

The screenshot shows the SAP Ariba dashboard with the 'INBOX' tab selected. A red circle with the number '1' highlights the 'INBOX' tab. Below the navigation bar, there are tabs for 'Orders and Releases', 'Time & Expense Sheets', 'Early Payments', 'Scheduled Payments', 'Remittances', 'Inquiries', 'Notifications', and 'More...'. The 'Orders and Releases' section is active, showing a sub-tab for 'Items to Ship'. A 'Search Filters' section is visible. Below that, a table lists 'Orders and Releases (14)'. The table has columns: Type, Order Number, Ver, Ship To Address, Amount, Date, Order Status, Settlement, Amount Invoiced, Revision, and Actions. A red circle with the number '2' highlights the 'Order Number' 'PO12351' in the first row of the table. The row details are: Order, PO12351, Some Department of My Company, sydney, NSW, Australia, \$70,470.00 AUD, 15 Aug 2016, New, Invoice, \$0.00 AUD, Original, and Actions.

This screenshot shows a close-up of the 'Create Service Sheet' button. A red circle with the number '3' highlights the button. The button is part of a row of three buttons: 'Create Order Confirmation', 'Create Service Sheet', and 'Create Invoice'. Below the buttons, there are tabs for 'Order Detail' and 'Order History'.

# Create Service Sheet

1. Enter the **Service Sheet Number**
2. Enter **Service Start and Finish Dates**
3. As for the invoice if there is a ContractID,
  - **Add Contract/Catalog items**
  - **Add Contract/Catalog items and create a Non-Catalog item**
4. If no ContractID
  - **Add Unplanned Item**

Create Service Sheet Update Save Exit Next

Service Sheet Header \* Indicates required field Add to Header

Summary

Purchase Order: 4505987374

Service Sheet #:  **1**

Service Start Date:  4 Jul 2018

Service End Date:  **2**

Location/Reference:

**Subtotal: \$0.00 AUD**

**Service Start Date: \***

**Service End Date: \***

**\*Please note that the attachment name length cannot be longer than 40 characters.**

**\*Attachments**  
The total size of all attachments cannot exceed 20MB Remove

Browse...

Service Entry Sheet Lines

Lin #	Part # / Description
10	test

**3**

**4**

Update Save Exit Next

# Service Sheet – Header Level

6. Enter **Service Sheet #**.

7. Enter **Service Start and End Dates**

8. **Add Attachments** The attachment is one of the following:

- Signed job card
- Signed time sheet
- Signed proof that the service was rendered

- **Click Choose File** to browse your computer files.
- Select and click on **Open**.
- Click on **Add Attachment**.

Note: Do NOT attach a copy of the invoice

Create Service Sheet

---

▼ Service Sheet Header
*\* Indicates required field*

---

**Summary**

Purchase Order: 4540613699	Subtotal:	\$60.00 AUD
<b>6</b> Service Sheet #:* 45851259	<b>7</b> Service Start Date:* 1 Oct 2017	<input type="button" value="Calendar"/>
Service Sheet Date:* 11 Oct 2017	Service End Date:* 10 Oct 2017	<input type="button" value="Calendar"/>

---

**Additional Fields**

Supplier Reference: <input type="text"/>	To: GEMCO Pty Ltd
From: S32 AU PENTAIR ERS 001 - TEST	108 St Georges Tce
St. Georges Terrace	Perth WA 6000
Perth 6000	Australia
Australia	

---

Field Contractor:

Name:

---

**\*Attachments** **8**

The total size of all attachments cannot exceed 10MB

No file chosen

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**Please note that attachments must comply with these specifications:**

- File must be < 10MB
- Filename must have less than 40 characters total
- Filename must not include special characters shown below:
- Á á é É í Í ó Ó ú Ú Ñ ñ & - \_ ' ° a \ / " \$ · ~ # ( ) û [ ] Ç

# Service Sheet – Line Level

9. For partial services, update the **Quantity**.

10. To add items from a catalogue, click **Add**, select **Add Contract/Catalog Item**

11. Click **Next**.

**12** Review Service Sheet details & click **Submit**.

➤ Screen returns - Purchase Order. Order Status has changed to Partially/Service

Service Entry Sheet Lines

Line #	Part # / Description			Contract #
▼ 10	PIMA Wireless bus expander extra			
	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="text"/>	Type: Service	Qty / Unit: 3 EA Price: \$20.00 AUD \$60.00 AUD <input type="button" value="Delete"/>
	<input type="text" value="Install alarm at SKS Ramp3"/>			
SERVICE PERIOD				
COMMENTS				
	Add Comments:	<input type="text"/>		
<input type="button" value="Add Pricing Details"/>				
<input type="button" value="Previous"/> <input type="button" value="Update"/> <input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Next"/>				



# Service Sheet Status

- Service Entry Sheets are system generated from the Invoice submitted (Method 1)
- The SES status changes based on the buyers response
  - Approved – The Invoice will be released by the system to BHP
  - Rejected – You need to Edit and Resubmit the Invoice and a new SES will be system generated and sent to BHP (the process will repeat)
- All Service orders require the Service Sheet Status of Approved, prior to the Invoice being released

# Service Sheet Status

To review submitted Service Sheets

1. Click **Outbox**.
2. Select **Service Sheets**.
3. Locate Service Sheet.

The Status of the Service Sheet:

- **Sent**: sent to the buyer
- **Approved**: Invoice released
- **Invoiced**: Invoice received into BHP system
- **Rejected**: has been Rejected

➤ To view Invoice Status, refer to the invoice guide

<input type="checkbox"/>	Service Sheet #	Customer	Related PO	Date	Amount	Routing Status	Status
<input type="checkbox"/>	SDT2INV	South32 International Investment Holdings Pty Ltd - TEST	4540613087	20 Jun 2017	\$150.00 AUD	Acknowledged	Invoiced
<input type="checkbox"/>	INV6685#1	South32 International Investment Holdings Pty Ltd - TEST	4540606685	16 Jun 2017	\$100.00 AUD	Acknowledged	Sent
<input type="checkbox"/>	INVS1028RT	South32 International Investment Holdings Pty Ltd - TEST	4540606859	23 May 2017	\$221.90 AUD	Acknowledged	Rejected
<input type="checkbox"/>	S1029RT3	South32 International Investment Holdings Pty Ltd - TEST	4540606869	22 May 2017	\$68.43 AUD	Acknowledged	Approved
<input type="checkbox"/>	INVS1029RT2	South32 International Investment Holdings Pty Ltd - TEST	4540606869	22 May 2017	\$172.40 AUD	Acknowledged	Partially Invoiced

# Invoice Report from the Outbox

**1** From within the Outbox

2. Click the **Table Menu**

3. **Export to Excel**

The screenshot shows the SAP Ariba Outbox interface. The top navigation bar includes HOME, INBOX, **OUTBOX**, CATALOGS, REPORTS, and UPLOAD/DOWNLOAD. Below this is a sub-menu with Invoices, Order Confirmations, Ship Notices, Service Sheets, Extended Collaboration, Product Replenishment, and Drafts. The main content area is titled 'Invoices' and features a search filter section. Below the search filters, it indicates 'Invoices (100+)'. A table lists invoice details with columns: Type, Invoice #, Customer, Reference, Submit Method, Submitted By, Origin, Source Doc, Date, Amount, and Routing Status. A table menu icon is visible in the top right corner of the table area. A dropdown menu is open, showing options: 'Export to Excel', 'Export all Rows', 'Export Current Page', 'Date Display', 'Show Time', and 'Table Size'. The 'Table Size' section is expanded, showing options: 100 (checked), 200, 300, 400, and 500.

Type	Invoice #	Customer	Reference	Submit Method	Submitted By	Origin	Source Doc	Date ↓	Amount	Routing Status
Standard Invoice	AJ9P7Z230	South32 International Investment	4540889762	Online	Supplier	Supplier	Order	7 Nov 2017	\$858.00 AUD	Ackn

# Reporting

1. Click on the **Reports** Tab.
2. Click **Create**.
3. Enter **Title of Report**.
4. Select **Report Type**.
5. Click **Next**.

HOME INBOX OUTBOX CATALOGS **REPORTS** 1

Reports

Use CSV reports to track information on account usage, such as purchase orders and invoices. Report files are UTF-8 encoded. If your application does

Report Templates

Title ↑	Schedule Type	Report Type	Status	Last Run	Next Run

↳ Run Download Edit Copy **2** Create Refresh Status

Report Next Exit

Enter a title and description for this report. Check the Time Zone and Language settings. [More](#)

1 Report Description

2 Criteria

3 Title: \*

Description:

Time zone: Pacific/Yap

Language: English

4 Report Type: \*

Select  
Failed Invoice  
Failed Order

Exit

- 6 Select **Parameters** (each report has different parameters).
- 7 Click **Submit**.
- 8 Download the Report:
  - 1) Select **Report**
  - 2) Click **Download**

Reports

Use CSV reports to track information on account usage, such as purchase orders and invoices. Report files are UTF-8 encoded. If your application does not read UTF- [More](#)

Report Templates

Title ↑	Schedule Type	Report Type	Status	Last Run	Next Run	Created	Created By	Report Size
<input checked="" type="radio"/> Invoice 1	Manual	Invoice	Processed	26 Nov 2014	26 Nov 2014	26 Nov 2014	Kylie Preisig-Toro	959 B
<input type="radio"/> report 1	Manual	Order Summary	Processed	9 Dec 2014	9 Dec 2014	9 Dec 2014	Kylie Preisig-Toro	259 B

↳ Run **2** Download Edit Copy Delete Create Refresh Status



# Support

Support Type	Contact
<b>Ariba Support</b>	<ol style="list-style-type: none"><li>1. Click on the <b>Help Centre – Support</b></li><li>2. Click <b>Start</b> next to 'I need help with...'</li><li>3. Select support option;<ul style="list-style-type: none"><li>• <b>Email SAP Ariba Customer Support</b></li><li>• <b>Get help by Live Chat</b></li><li>• <b>Get help by Phone</b></li></ul></li></ol>
<b>Supplier Information Portal</b> (Location of Training Guide/s and Video/s)	<ol style="list-style-type: none"><li>1. On the <b>Home</b> screen</li><li>2. Click on <b>Company Settings</b></li><li>3. Click on <b>Customer Relationships</b></li><li>4. Click on <b>Supplier Information Portal</b></li></ol>