SAP Ariba /\\\

Feature at a Glance
Links to eForms in invoice documents

Johan Holm, Solution Manager SAP Ariba
Roger Nyberg, Product Manager SAP Ariba
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THE BEST RUN **SAP**

Feature at a Glance

Introducing: **Links to eForms in invoice documents**

Customer challenge

Customers may have the need to process additional information related to the settlement of an invoice in a separate document that can be referenced from the invoice. For example: implementing a balance document eForm in SAP Ariba to track the amount that has not/will not be paid for an invoice.

Today, however, there's no way to link an invoice or IR to an eForm, whereas that capability exist already on the requisition and purchase order.

Meet that challenge with
SAP Ariba

With this feature, organizations using eForms can customize invoices and invoice reconciliation documents so users can link to a related eForm. Approvers reviewing the invoice can then click the eForm link to view the eForm, giving them the information they need for informed approval.

Similar ability already exist on the requisition and purchase order documents.

Experience key benefits

This feature allows customers to link invoices to supporting documents (eForms), making the processing of invoices.

Solution area

- SAP Ariba Buying and Invoicing
- SAP Ariba Invoice Management

Implementation information

To have this feature enabled, please have your Designated Support Contact (DSC) submit a Commercial Request with your SAP Ariba Customer Engagement Executive or Account Manager.

Prerequisites and Limitations

- This feature requires a customization on your site with SAP Ariba Services.
- This feature is for eForms, not forms created in the forms builder.
- You can have eForm links added in the header of invoices and IR documents but not at the line level.
- You can use this feature with invoices and IR documents created after eForm linking is implemented on your site.
- eForm ID fields are not included in cXML IR documents sent to Ariba Network.

Feature at a Glance
Overview: **Links to eForms in invoice documents**

- SAP Ariba technical resource can add a link to the invoice and IR header that reference a defined eForm.

- When creating or editing an invoice or IR, the eForm field is displayed and an instance of the eForm can be linked to the invoice which brings the user to a search page that allows the user to pick an instance of an eForm based on the fields that were created for the eForm.

- Example: "Balance Document" eForm search field added to the IR

- The status of the eForm referenced can be configured to be either fully approved/processed documents, or also to include approving/processing status.

- Up to two eForm fields for invoice documents can be carried over to SAP Ariba Analysis and made available for reporting.

Feature at a Glance
Configuring: **Links to eForms in invoice documents**

- A normal field can be created in Customization Manager -> Field Configuration for classes Invoice and InvoiceReconciliation

- A published eForm can now be the Type of a Normal Field. In the image to the left, the type 'Balance Document' is an eForm

Feature at a Glance

Configuring: **Links to eForms in invoice documents**

- Checkbox Chooser Not Restricted Based on Status has been added for fields that are of an eForm type to allow the buyer to link an invoice document to an eForm that have not been Processed and Approved yet*.

* Requisitions can only be linked to eForms that have been Processed and Approved