SAP Ariba

Supplier Guide
Supply Chain Collaboration

General Functionality Process Guide

Version 4

Introduction

- The General Functionality is a ***generic guide*** that provides information about the SAP Business Network and the Ariba Network including how to navigate, setup, edit and access the information that you require
- All screenshots and ***examples*** contained within Ariba process guides are taken from various Buyers test Ariba Network accounts. All documents and the content within the documents are fabrications and in no way reflect any past, current or future documents and any similarities are pure coincidence.
- Your Business System Administrator can assist with permissions and login on details
- Permissions allow access to specific sections of the Ariba Network, if there is a section that you require contact you system Administrator, refer to Identifying and Contacting your System Administrator
- The Supplier Information Portal can be accessed via the Help Centre, a direct link or via Customer Relationships, refer to Accessing the Supplier Information Portal
- The transaction workbench lets you create pre-set views based on how you work, and the customers you manage.
- Get to the documents you need faster than by sorting through individual orders or invoices.

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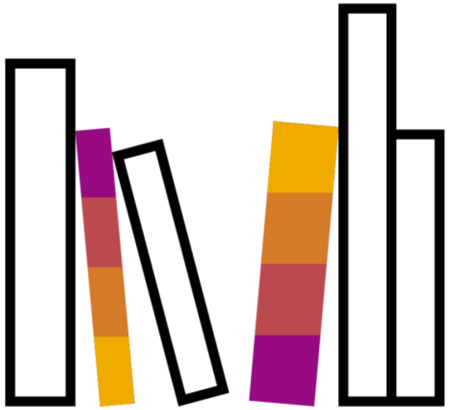


User Access and Login

Once the System Administrator has created an access for you, two emails will be triggered from Ariba Commerce Cloud

❖ You will receive two emails,

The **first email -** Contains your Username, this is in an email format and may or may not be you actual email

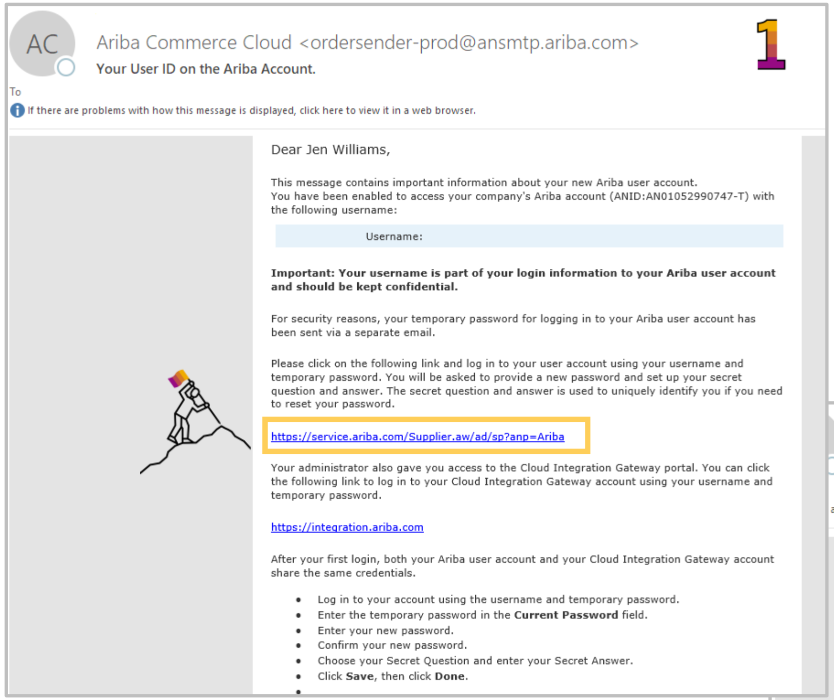
The **second** email - Contains a temporary password

Use the link on the first email to access the Ariba Network, enter the Username from the email

then

Enter the Temporary Password on the second email

❖ You will be prompted to change your password



1

Ariba Commerce Cloud <ordersender-prod@ansmtp.ariba.com>
Your User ID on the Ariba Account.

To

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Jen Williams,

This message contains important information about your new Ariba user account.
You have been enabled to access your company's Ariba account (ANID:AN01052990747-T) with the following username:

Username:

Important: Your username is part of your login information to your Ariba user account and should be kept confidential.

For security reasons, your temporary password for logging in to your Ariba user account has been sent via a separate email.

Please click on the following link and log in to your user account using your username and temporary password. You will be asked to provide a new password and set up your secret question and answer. The secret question and answer is used to uniquely identify you if you need to reset your password.

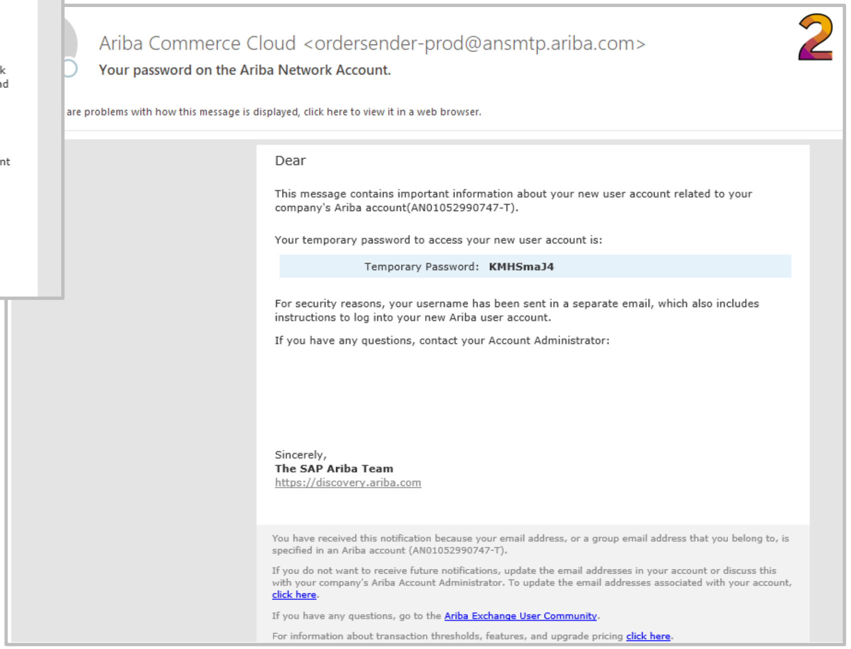
https://service.ariba.com/Supplier.aw/ad/sp?anp=Ariba

Your administrator also gave you access to the Cloud Integration Gateway portal. You can click the following link to log in to your Cloud Integration Gateway account using your username and temporary password.

https://integration.ariba.com

After your first login, both your Ariba user account and your Cloud Integration Gateway account share the same credentials.

- Log in to your account using the username and temporary password.
- Enter the temporary password in the **Current Password** field.
- Enter your new password.
- Confirm your new password.
- Choose your Secret Question and enter your Secret Answer.
- Click **Save**, then click **Done**.



2

Ariba Commerce Cloud <ordersender-prod@ansmtp.ariba.com>
Your password on the Ariba Network Account.

are problems with how this message is displayed, click here to view it in a web browser.

Dear

This message contains important information about your new user account related to your company's Ariba account(AN01052990747-T).

Your temporary password to access your new user account is:

Temporary Password: **KMHSmaJ4**

For security reasons, your username has been sent in a separate email, which also includes instructions to log into your new Ariba user account.

If you have any questions, contact your Account Administrator:

Sincerely,
The SAP Ariba Team
https://discovery.ariba.com

You have received this notification because your email address, or a group email address that you belong to, is specified in an Ariba account (AN01052990747-T).

If you do not want to receive future notifications, update the email addresses in your account or discuss this with your company's Ariba Account Administrator. To update the email addresses associated with your account, click here.

If you have any questions, go to the Ariba Exchange User Community.

For information about transaction thresholds, features, and upgrade pricing click here.

After logging in, the blue ribbon at the top of the screen will display **SAP Business Network**

➢ Go to https://supplier.ariba.com

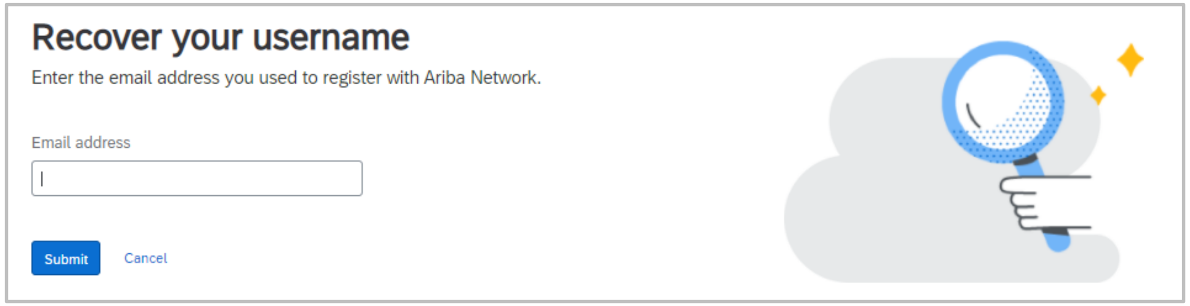
To Login:

1. Enter **Username**
2. Enter your **Password**
3. Click on **Login**
4. If you have forgotten your User name or password, click on **Forgot Username or Password**

Forgot Username or Password

1) Enter your **email OR username**
2) Click **Submit**
3) An email from Ariba Commerce Cloud will be sent to the registered email address

- Multiple customers – **1 login**
- **Username** in form of email – does not need to be a real email address – e.g. bob@abc.com



The System Administrator creates users, applies permissions and should be contacted when there is questions, updates or changes to your log in profile

Contact the Business System Administrator when:

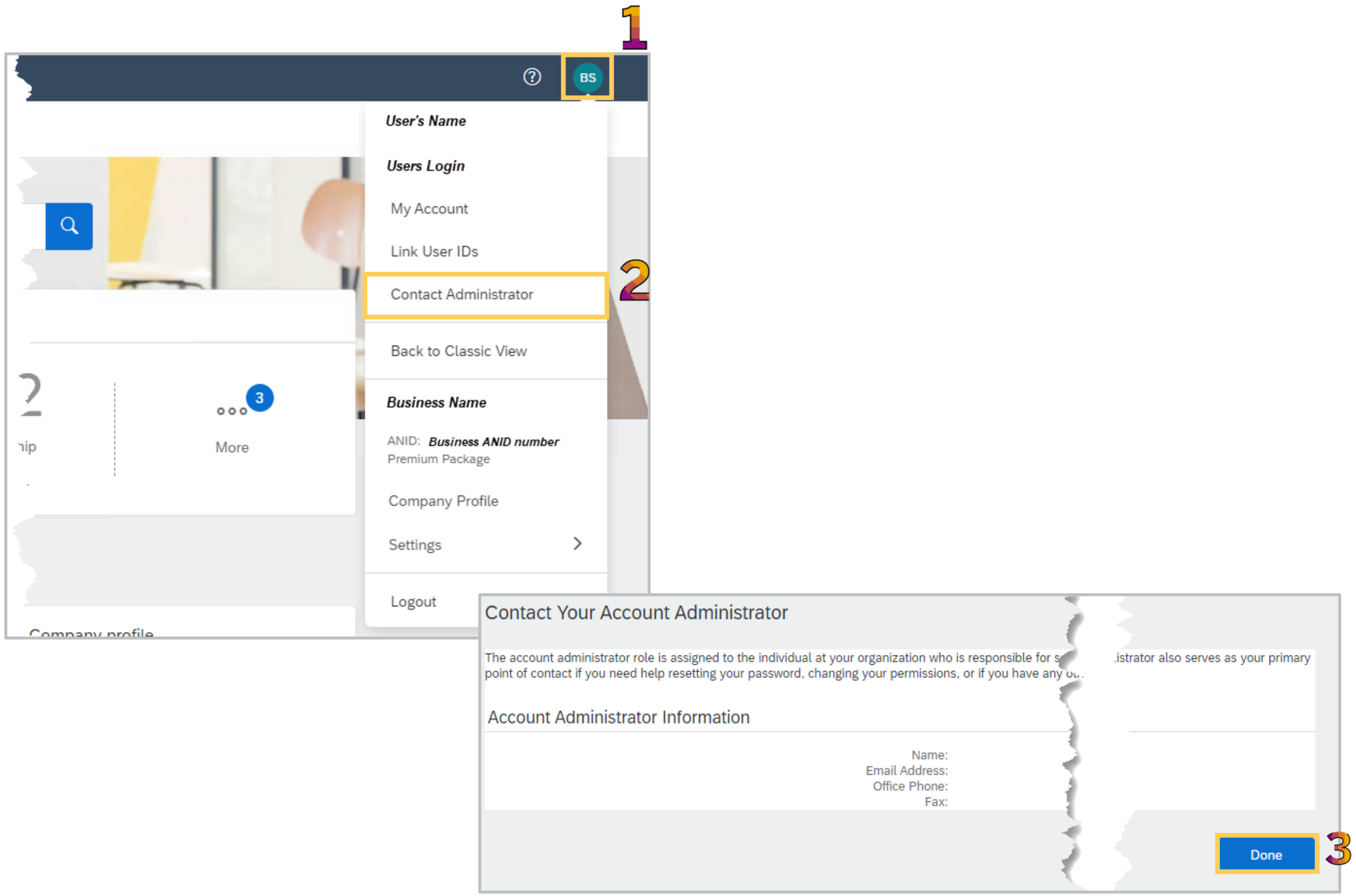
- You need permissions to access a tab required for your role
- You need to have you password reset

1. Click on your user **Initials**

2. Select **Contact Administrator** from the drop down list

- There are different options to contact the System Administrator, use the option wanted

3. Click on **Done** to Return to the page you accessed the drop down list from



Accessing “My Account”

- Accessing “My Account” allows users to make updates to their SAP Business Network Account

Note: Only change information that requires updates

Changes in My Account should only be completed when required, for example:

- A name Change
- Business Role Change
- Changing your Password

Note: All changes will trigger and email to confirm that you have requested the changes

1. Click on your user **Initials**

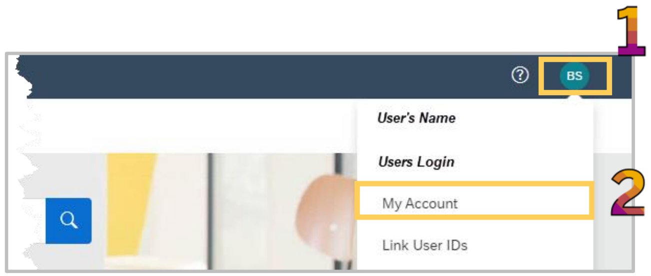
2. Click on **My Account**

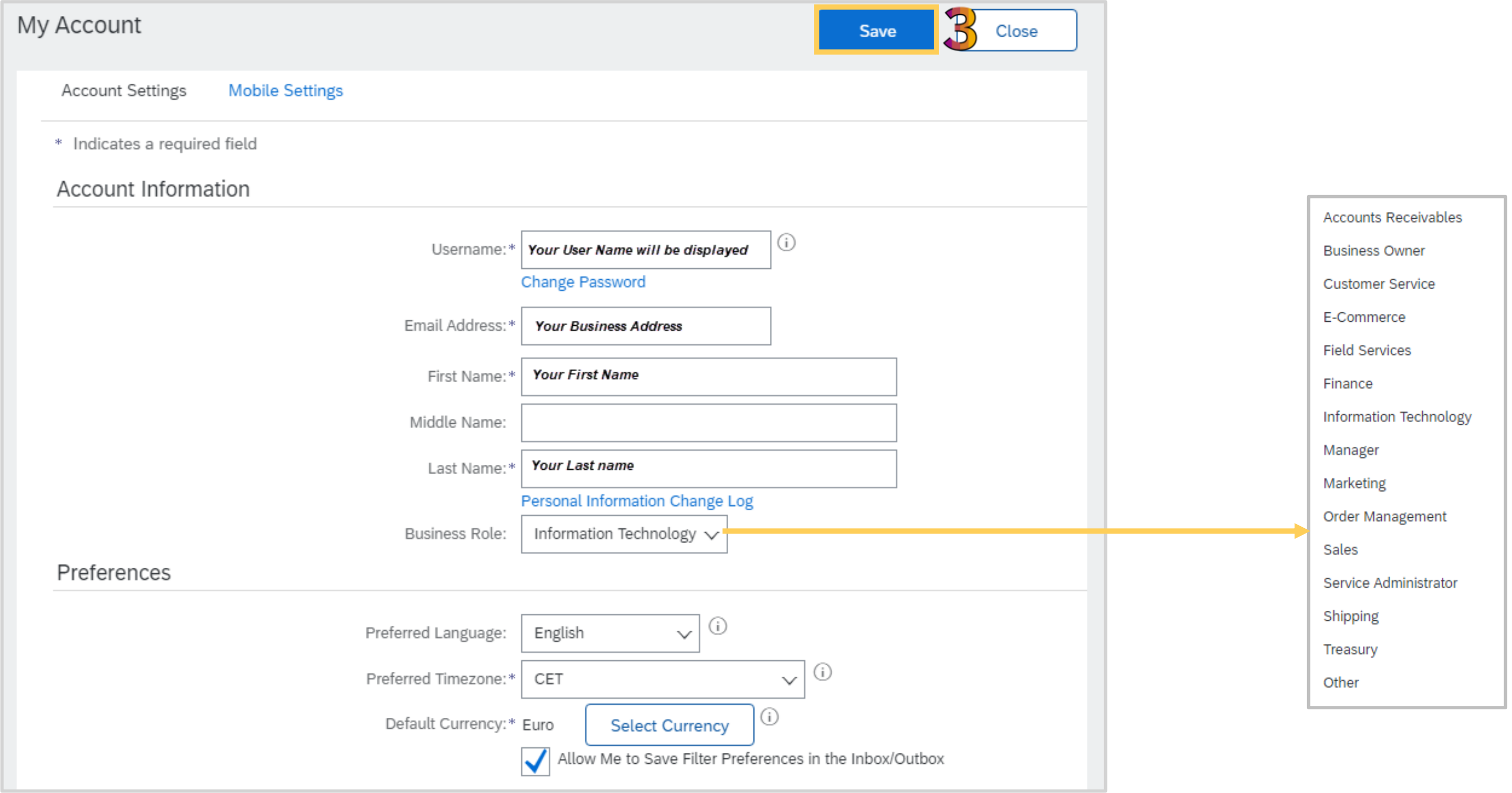
➢ The **My Account** screen is displayed

Note: that your System Administrator has entered the information while creating your account

- Update the required fields

3. Click on **Save**, a green ribbon indicates the changes have been saved successfully a red ribbon indicates that information is missing or incorrect





Linking your User ID's

When you have more than one login across different buyers or you need to access another users account during periods of leave you can link the accounts for easier access

There are two different ways to link an account:

- **Approval Needed**: Use this processes when another user is going on extended leave and you need to access their account during that time
- **No Approval Needed**: Use this account when you have multiple logins across multiple buyers

1) Click on your user **Initials**

2) Select **Link User ID's**

- The Link User ID's screen is displayed
- Select the option required

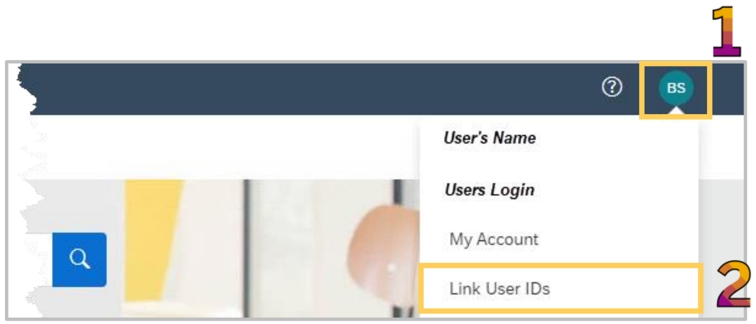
Approval Needed:

Enter the user name of the account you wish to access then click on **Send link Request**

No Approval Needed:

Enter the user name, enter the password, then click on Link Accounts

Note: You must be the account holder for No Approval needed



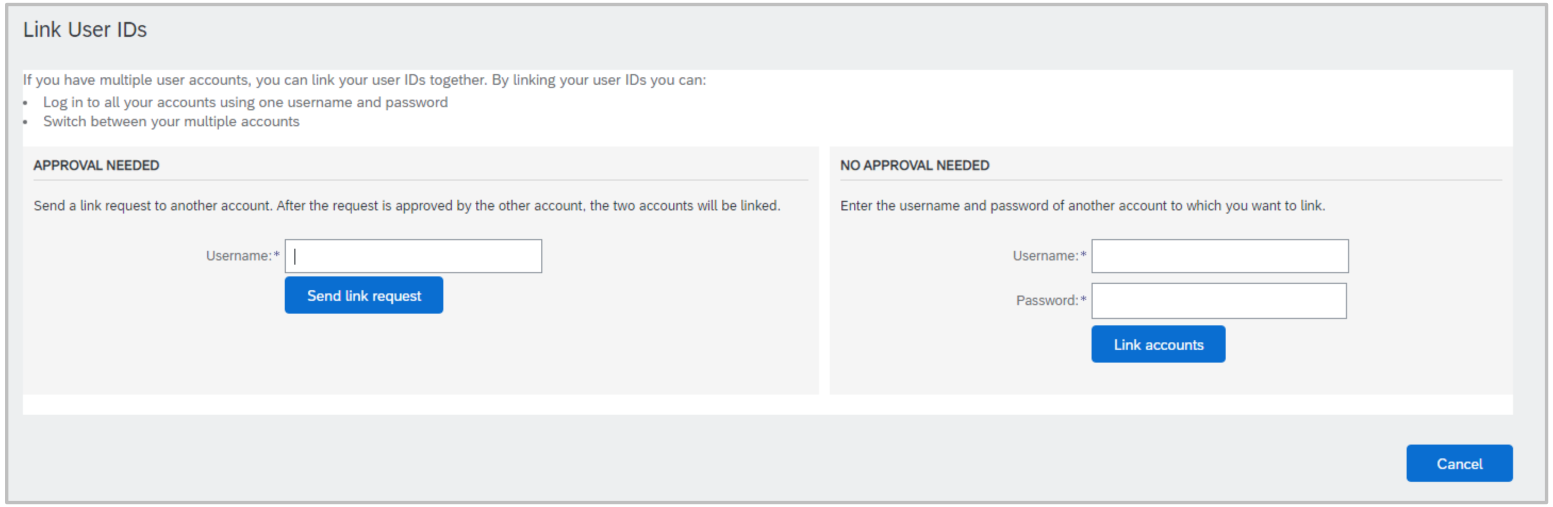
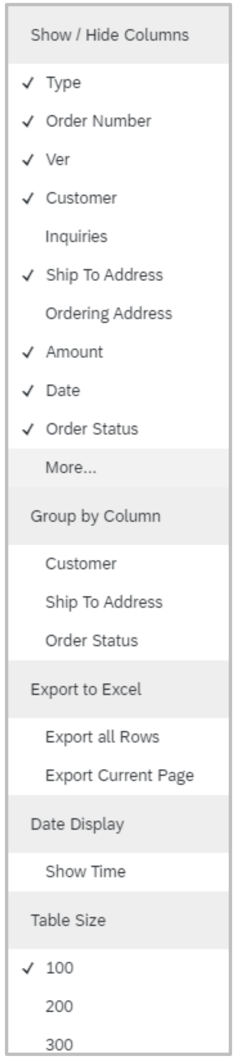
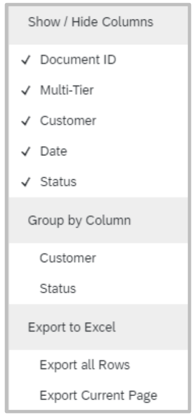


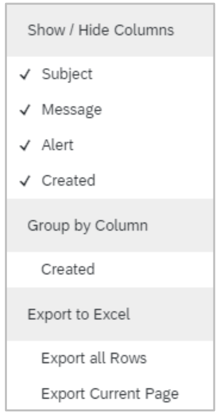
Table Options Menu provide users with the option to personalise the way information is displayed, it does not replicate across other users

The table options menu changes the view of the information in the information ribbon on the screen

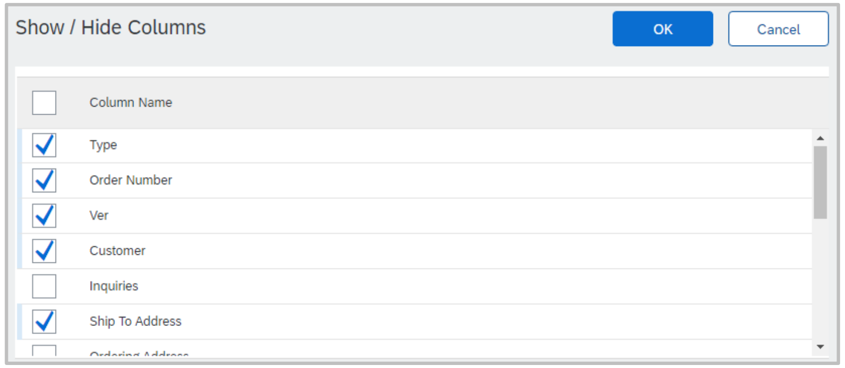
- Not all screens provide a Table Menu Options option
- Screens with a indicate there is an opportunity to personalize how the information is shown on a screen
- Different screens provides a different list of options based on the information contained within the scree
- Suppliers can sort by a set of the options listed







Examples of various Show/Hide columns in Table Options Menus



Column Headings vary by screen – users can determine the columns they wish to view

Switching from Transaction Accounts to Sourcing Accounts

Users can switch between the SAP Business Network transaction account and sourcing accounts such as Ariba Discovery and Ariba Contract Management

Some selections have a pop-up message, select the appropriate response

Ariba Discovery – Used for Request for Quote (RFQ) processes, access to global purchase ready buyers

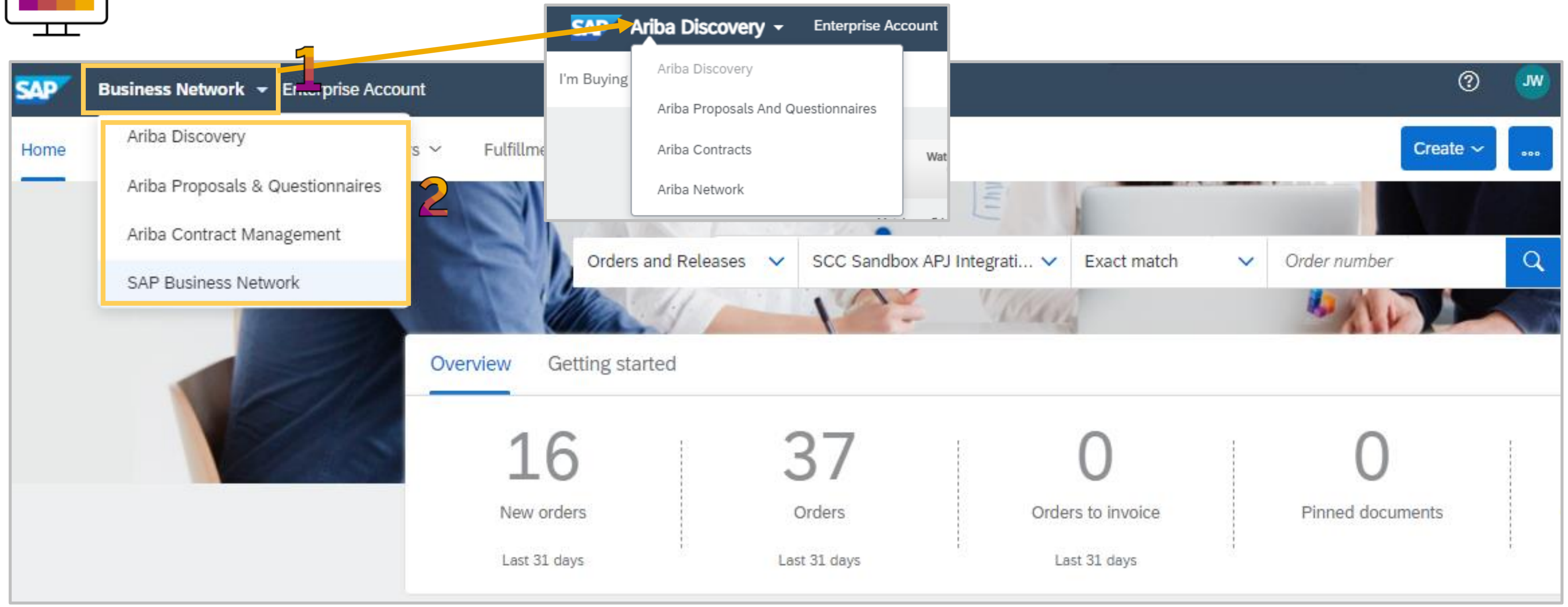
Ariba Proposals & Questionnaires – Used for Sourcing, including responding to prospects

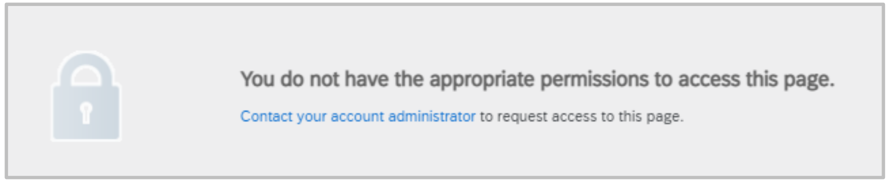
Ariba Contract Management –

SAP Business Network -

1. Click on the down arrow next to the name of the account you are in
2. Select the required account

Note: An error message appears when users do not have the required permissions. If you require access, contact you Business Ariba Network System Administrator. Refer to [Contact the System Administrator]





Seller Dashboard/Home page

1) **Access to Help**

2) **User Name Initials** – a drop down provides applicable accesses

3) **… (More) –** a drop down provides access to track, CSV upload and CSV download options-can also be accessed from other screens

4) **Create** – a drop down that provides short cuts to processes, can be accessed from other screen

5) **Accessible Tabs** – the tabs that you have permissions to access

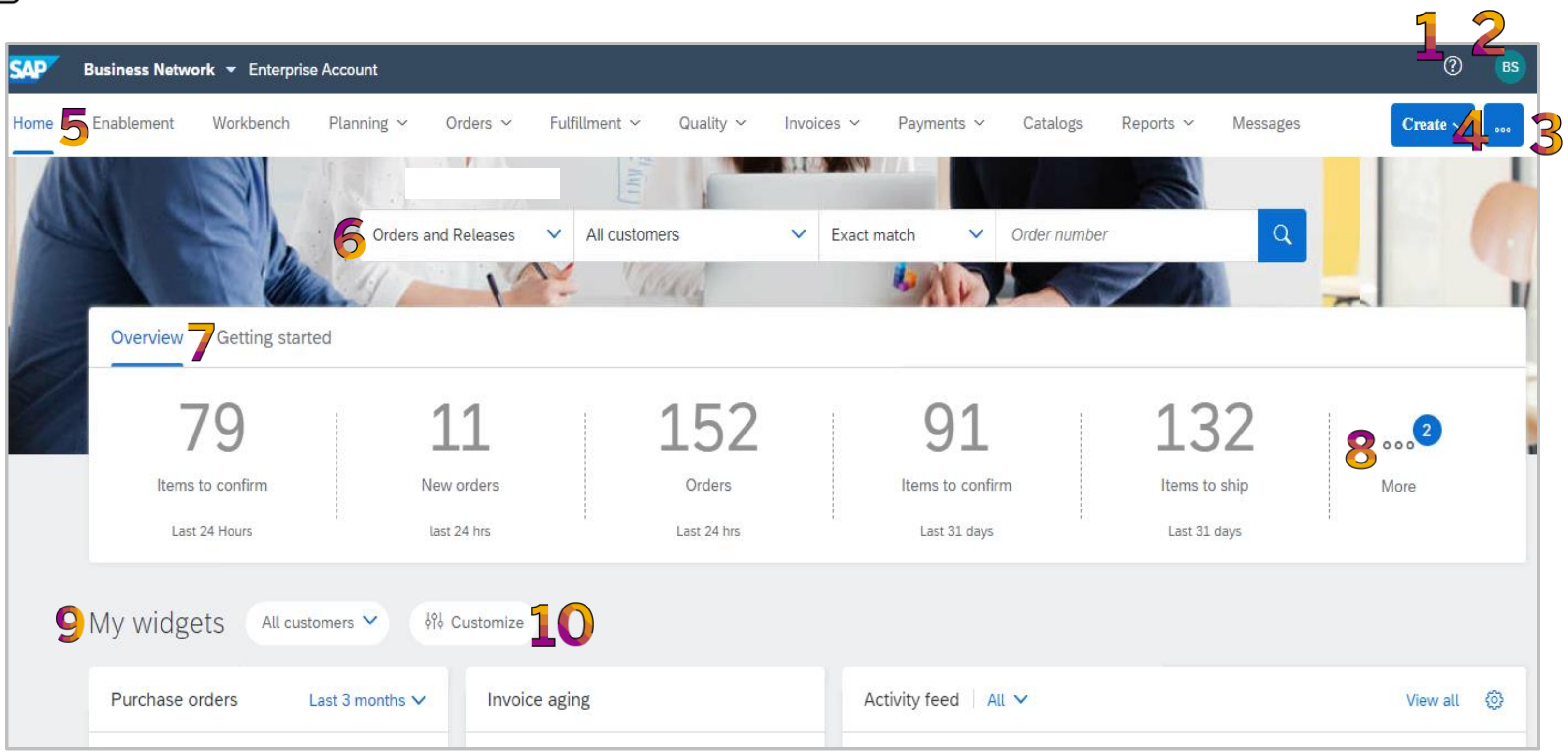
6) **Quick search options –** Allows searching for selected parameters from the Seller Dashboard /Home page

7) **Overview Bar** – helps to focus on important tasks related to orders and Invoices

8) **More** – indicates there are more tiles

9) **My Widgets** – Allows users to change the identify what widget they want to see on the Seller Dashboard /Home page

10) **Customize** – Shows the available options for My Widgets

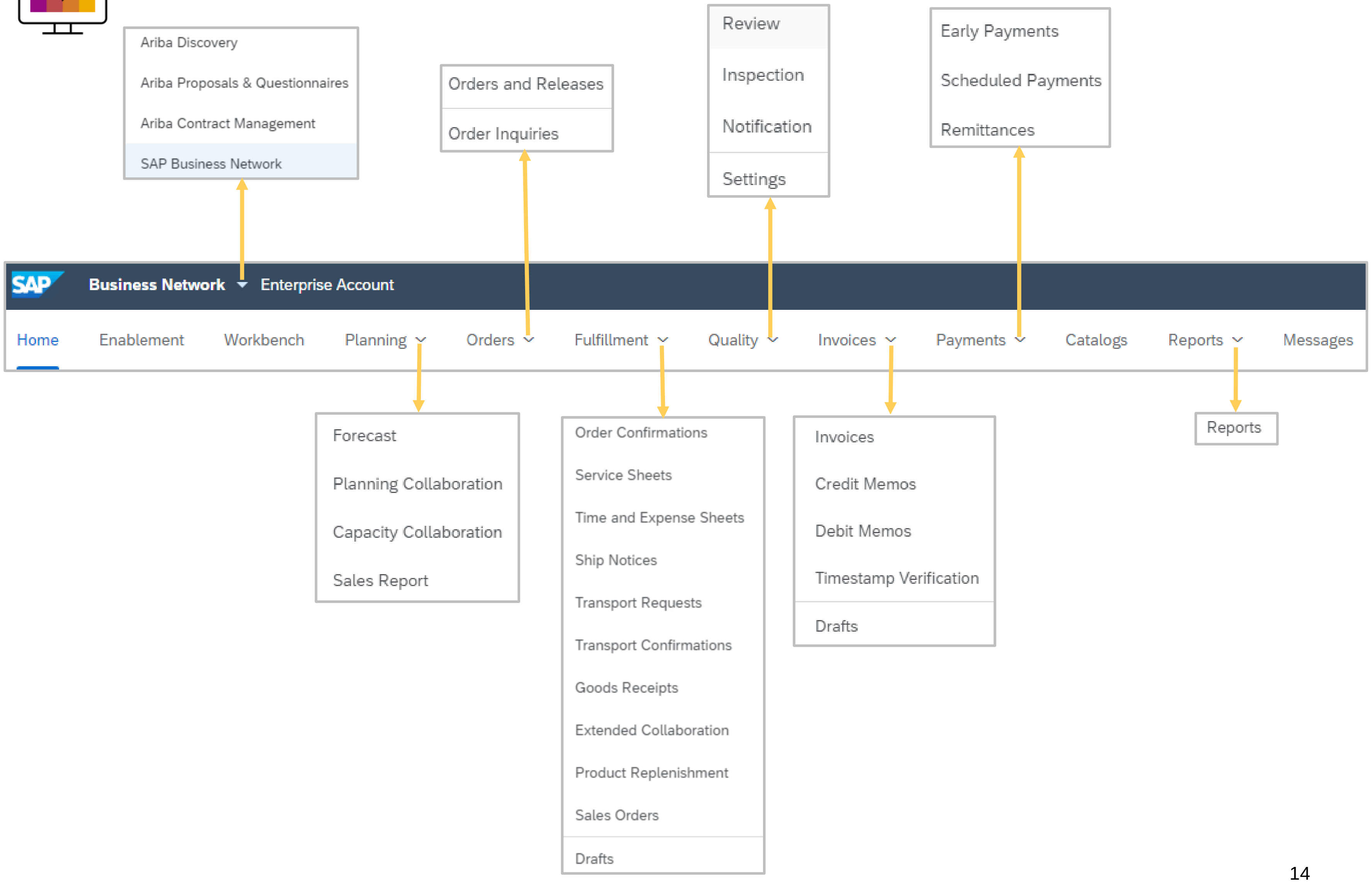


Screen Tabs

- Only the tabs that your Businesses System Administrator has assigned to you will appear, contact your System Administrator if you require other tabs to access required processes

When working with tabs, remember:

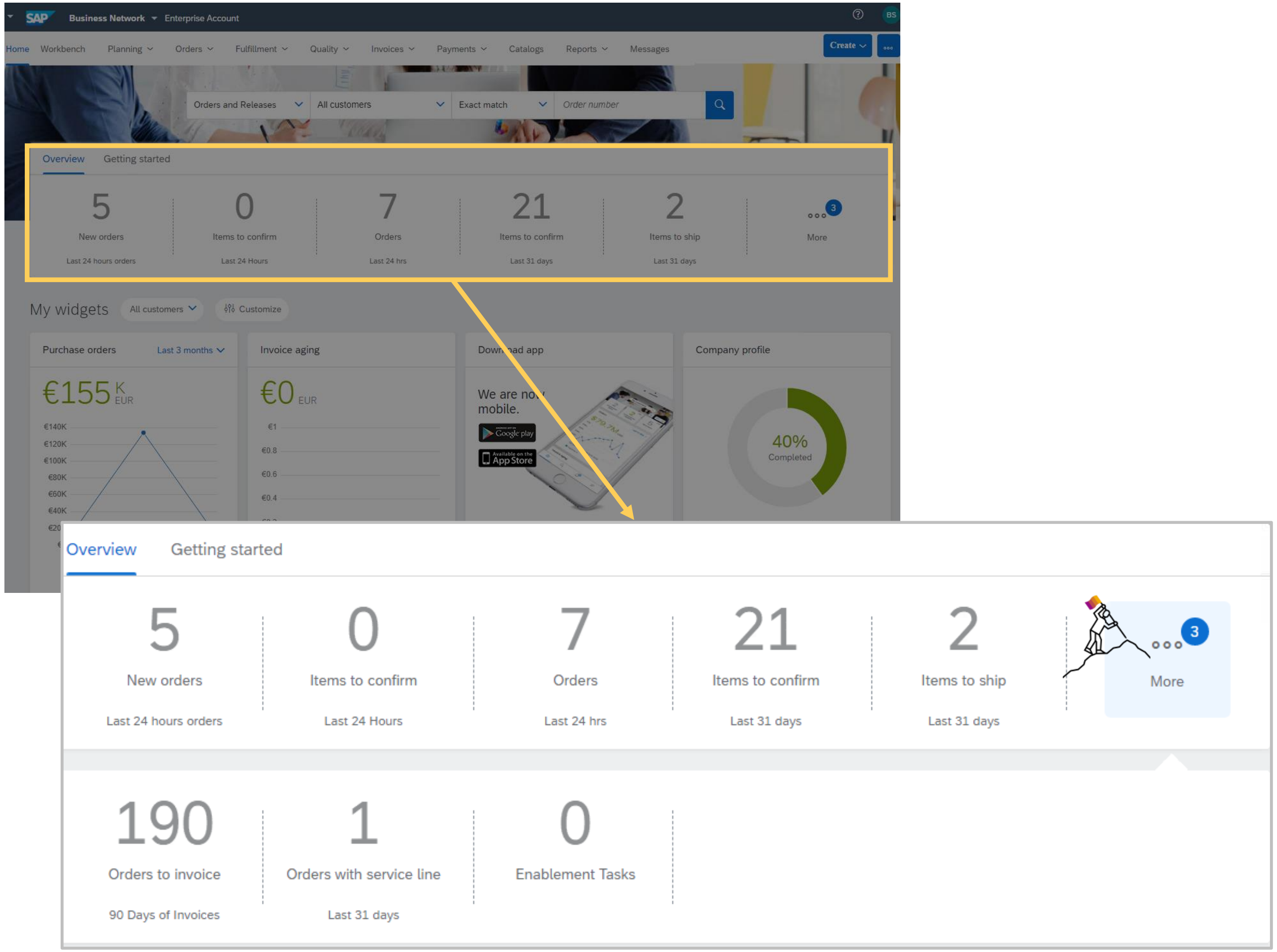
- The Tabs that each User can see is based on the permissions assigned by your Businesses System Administrator and the required processes determined from the Buyer
- Not all tabs have drop down lists
- Not all shown down list selections may be available
- Some functions can only be performed by the System Administrator
- The order of the tabs cannot be changed
- Refer to the Supplier Information Portal for your Buyer for more information about the processes required



Tile Bar Overview

The overview bar help suppliers focus on specific tasks related to orders and invoices, tiles can be customized, each tile takes the user to the Workbench

- The Overview tile bar can be personalized so that a user can keep track of order and/or invoices as part of their job
- Where there is a number in the indicates that there are more tiles to display in Overview
- A number indicates that there are more tiles to view, click on More and the tiles will be displayed
- The time frames (hours & days) shown on the tiles can be changed based on the user's requirements
- You can access each tile by clicking on it
- The name of each tile can be adjusted to reflect the needs to the user
- Tiles can be added or removed
- Personalisation enables suppliers to prioritise and keep track or order and invoices



My Widgets

Widgets that show insights such as invoice aging, leads, purchase order volume and more can be selected, use widgets to gain insights into your Buyer

The My widgets section can be customized by:

- Buyer
- Tile Type

All Items in Blue can be clicked on to:

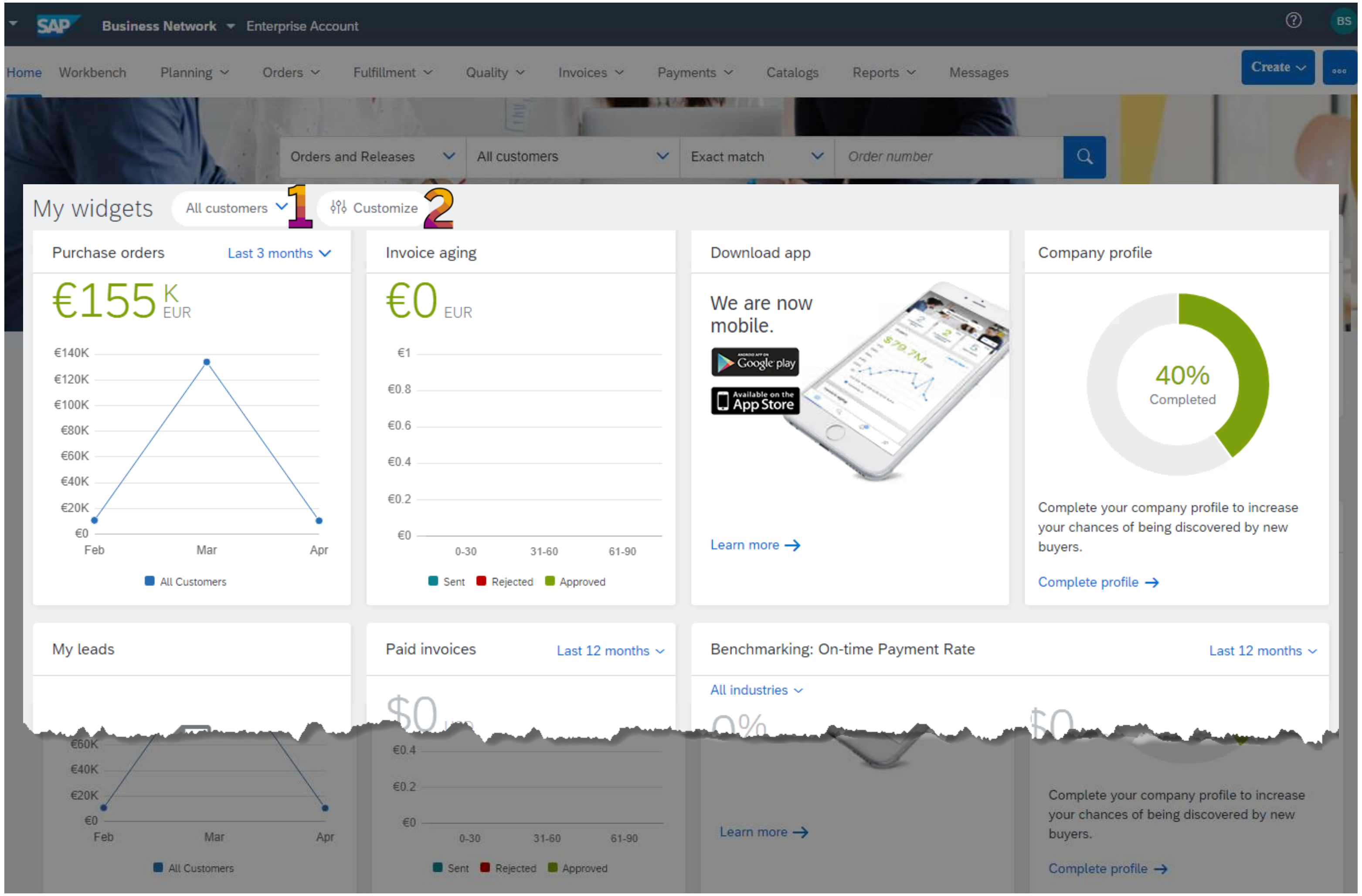
- Provide more information
- Change time frame of the information
- Update parts of the Ariba Network

- To Display Customers that you work with:
  1) Click on **All Customers** drop down and make your selection

- To Customize:
  2) Click on **Customise** and make your selection, refer to **Customising My Widgets**

- My Widgets provides users the options to display information relevant to their function

Note: Not all widgets are the same size, some are larger, also some widgets provide bar graphs, pie graphs, line graphs or information only



Customize My Widgets – How to Add or Remove Tiles

Widgets can be customized to provide information on the Seller Dashboard/Home page

1. Click On **Customize**

The Customize my widgets screen is displayed:

removed the widget from the list

adds the selected widget to the list

- Hover over the **Available widgets** name to display a Preview of the widget and what data it shows

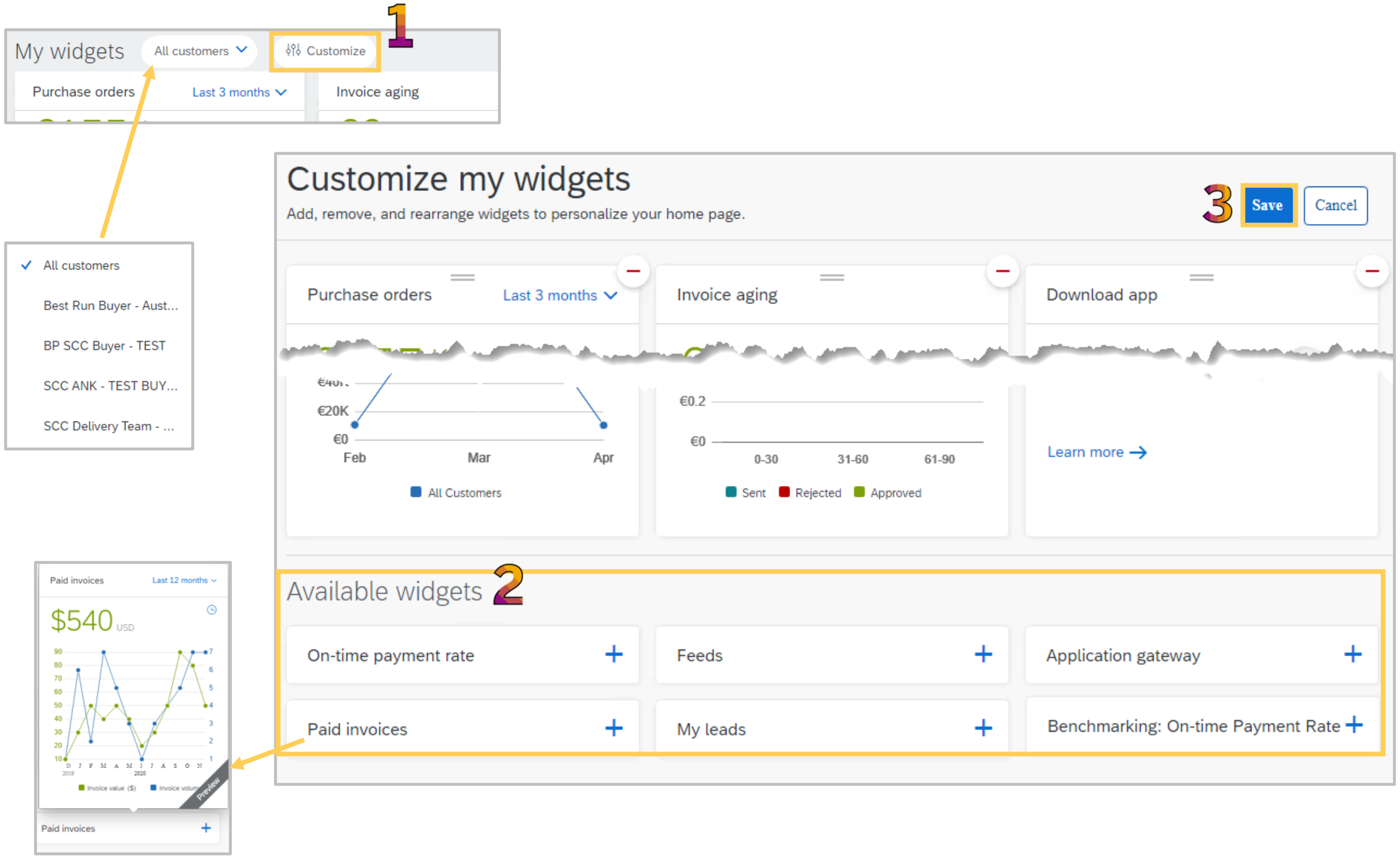
2. Select the widget/s required from **Available widgets**

3. Click on **Save**

- The widget is now added to the Seller Dashboard/ Home Page

Note: Clicking on All Customers and selecting a customer from the drop down list the information on the widget is displayed.

- Widgets cannot be customised by customer

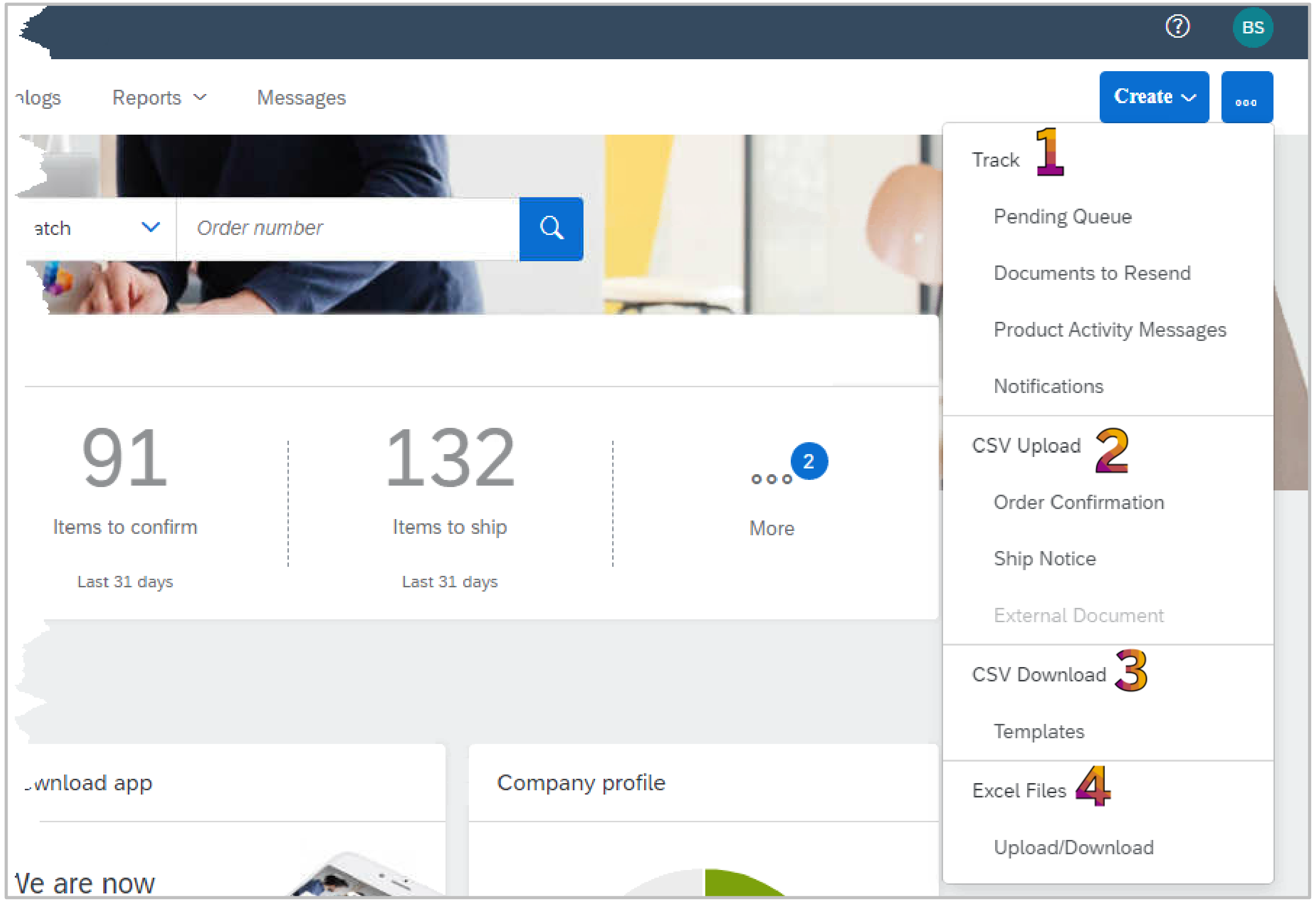


The … **(More)** selection provides a list of actions, be aware that not all actions are accepted by your Buyer

There are 4 separate options, they are:

1. **Track** – allows users to view documents that are in different statuses and opportunities to create, open and review documents displayed
2. **CSV Upload** – users upload CSV files they have created using the templates that the Buyer has uploaded for specific documents
3. **CSV Download** – provides the available templates for specific documents and the format they must be in
4. **Excel Files** – the upload download can be used to transact with Buyers using excel file format

Note: Any items that are greyed out are not available for selection and not all Buyers accept CSV files, confirm with your Buyer prior to using this process

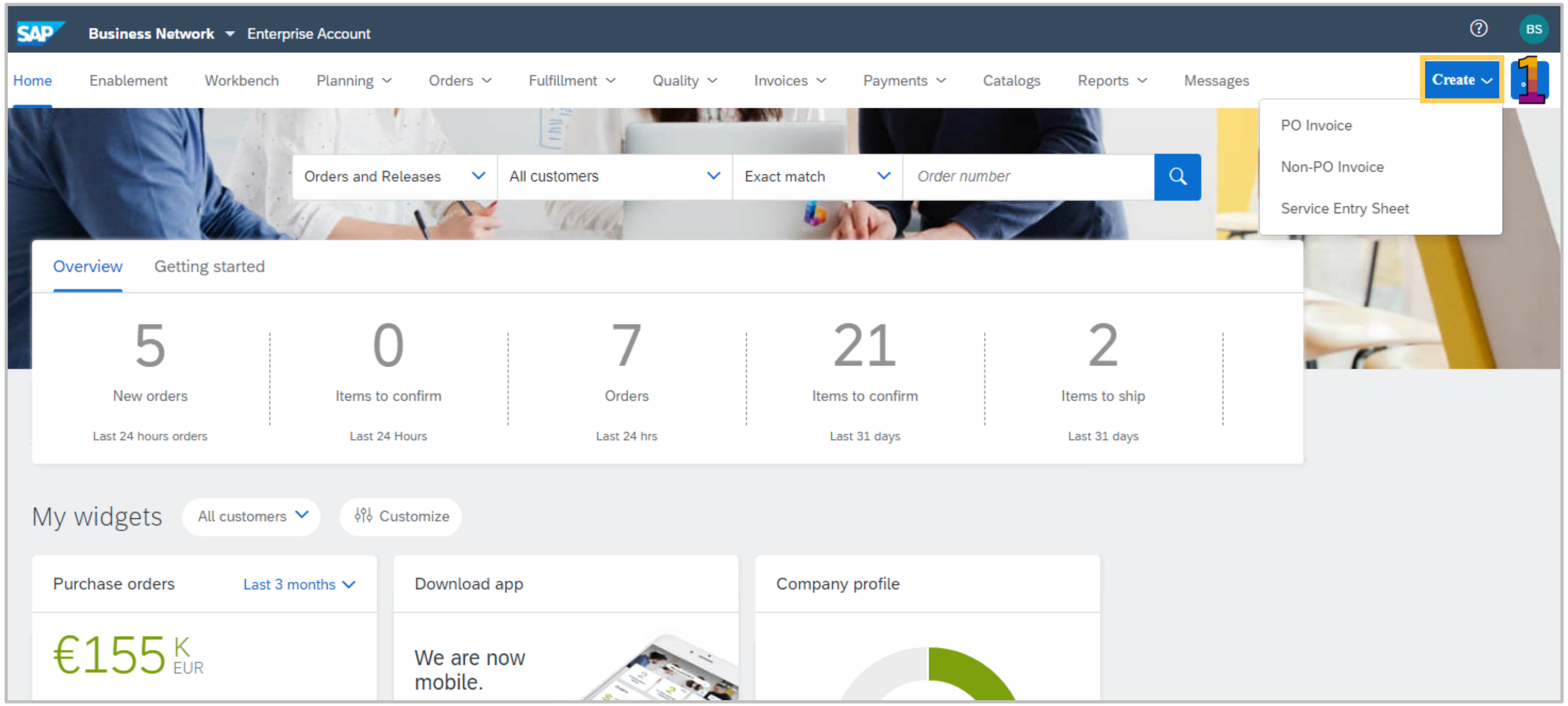


The **Create** enables suppliers to create the available options from the Dashboard/Home page

- The options available are based on the documents that are transacted with your Buyer, however, using this selection is general rather than specific to a document

- To create documents such as Order Confirmations, Ship Notices and Invoices refer to the applicable training documents on the relevant business Supplier Information Portal (SIP)

1. Click on **Create** to display the drop down list



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Track Options

Pending Queue Screen –Information

The **Pending Queue** provides users with information on documents that are in a “pending” status and identifies any resent documents

Track options provide Supply Chain Collaboration Suppliers the ability to track the documents they have sent using CSV, cXML or Excel formats

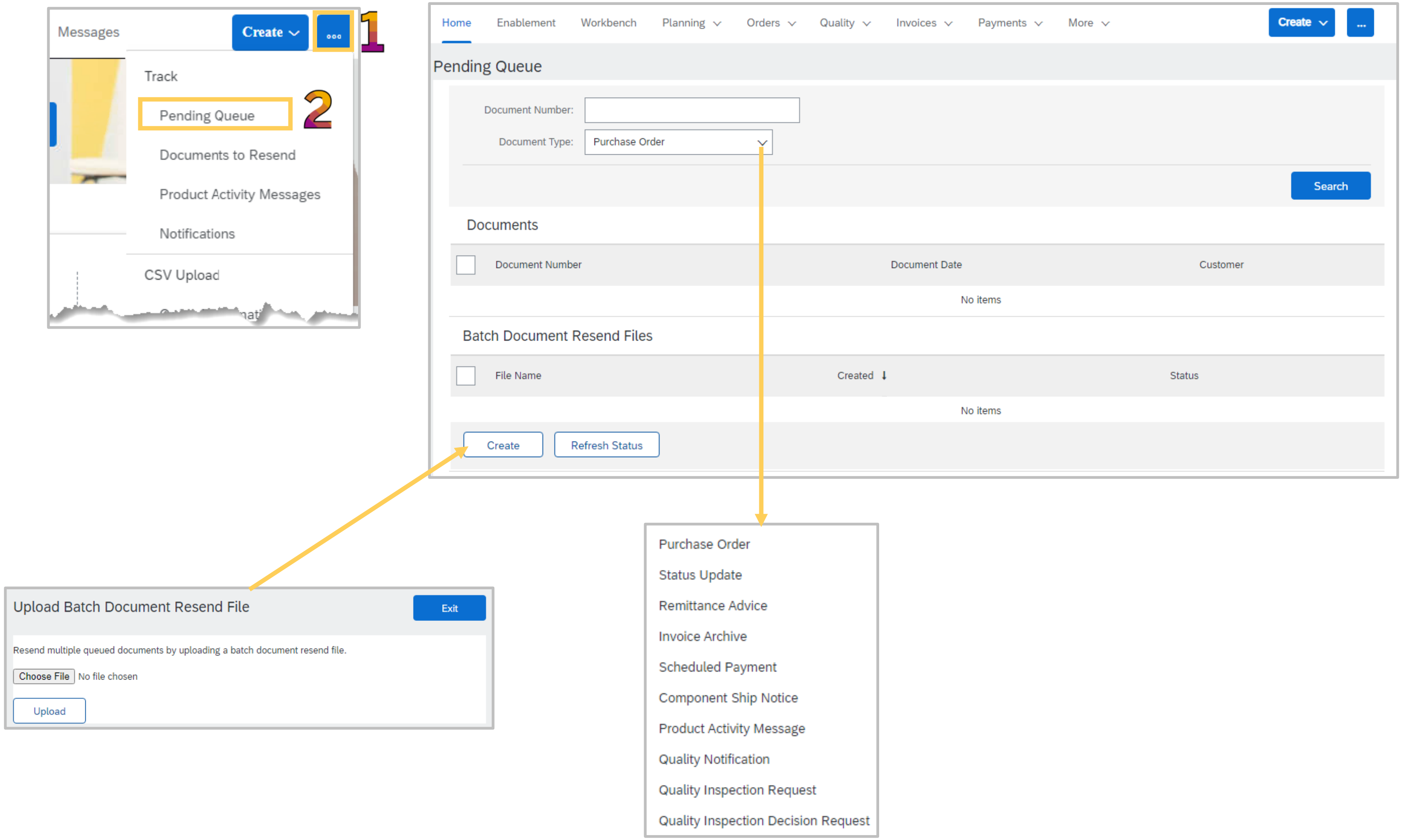
1) Click on ...

2) Select **Pending Queue**

- Users can search for a specific document and/order a specific document type by selecting it from the drop down list

- To activate a search click on Search, any results are displayed

- Use **Create** under Batch Resend Files when requested to do so by your Buyer or Support Centre



The **Documents to Resend** identifies what documents a Supplier is required to resend due to errors or system issues

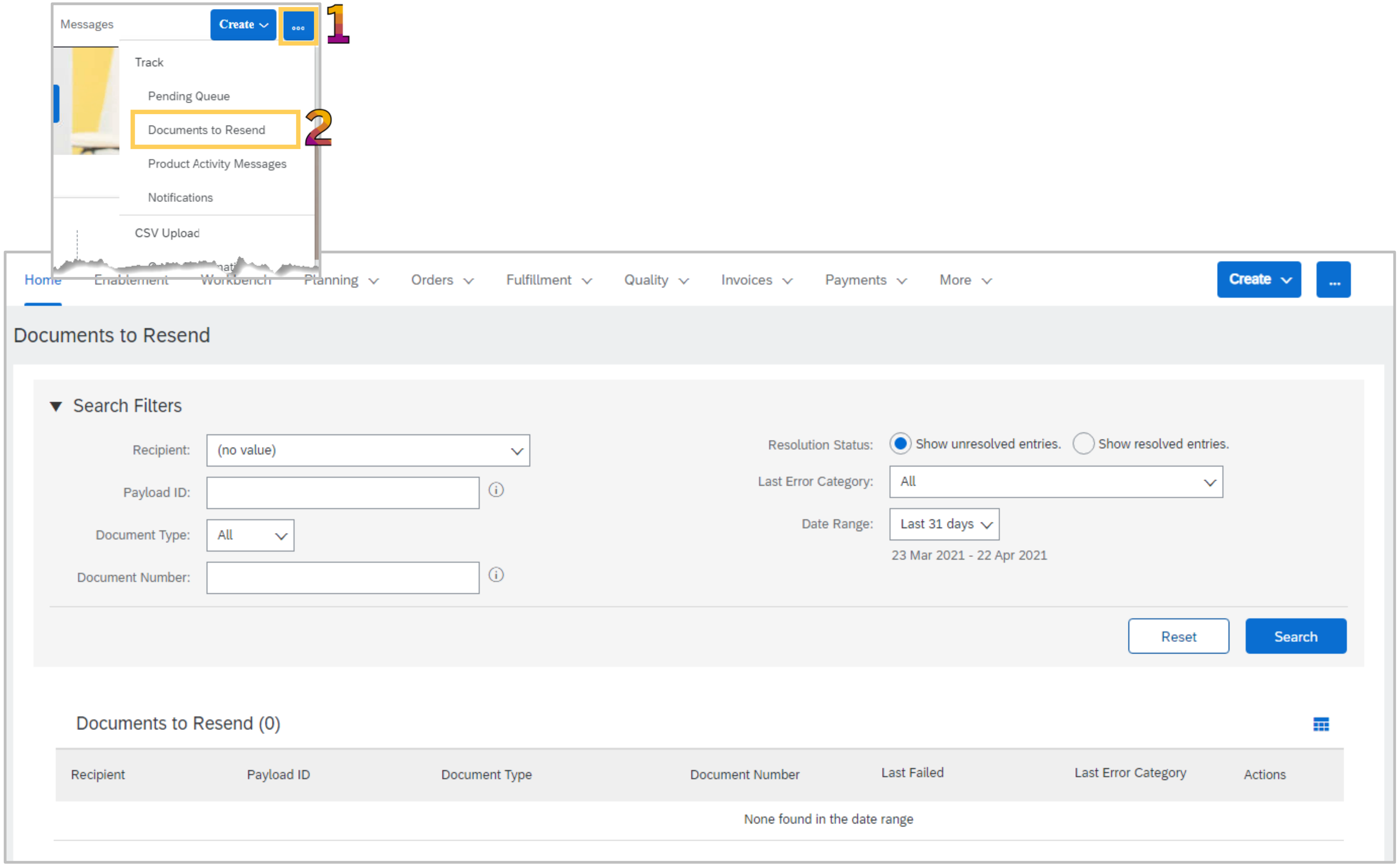
To Resend a Document either action by:

Opening the Document:
- Click on the **Document Number**
- Click on **Edit and Resubmit**
- Correct the errors
- Complete the document flow
- Click on **Submit**

Clicking on Actions
- Select resend

- Use Search Filters to locate a specific document, by completing the required fields

Use **Search Filters** to locate specific documents for:
- Recipient
- Payload ID
- Document Type
- Document number
- Resolution Status
- Last Error Category
- Allows specific dates to be searched



Product Activity Messages provide Supply Chain Collaboration suppliers with information about the product they sell to a specific Buyer

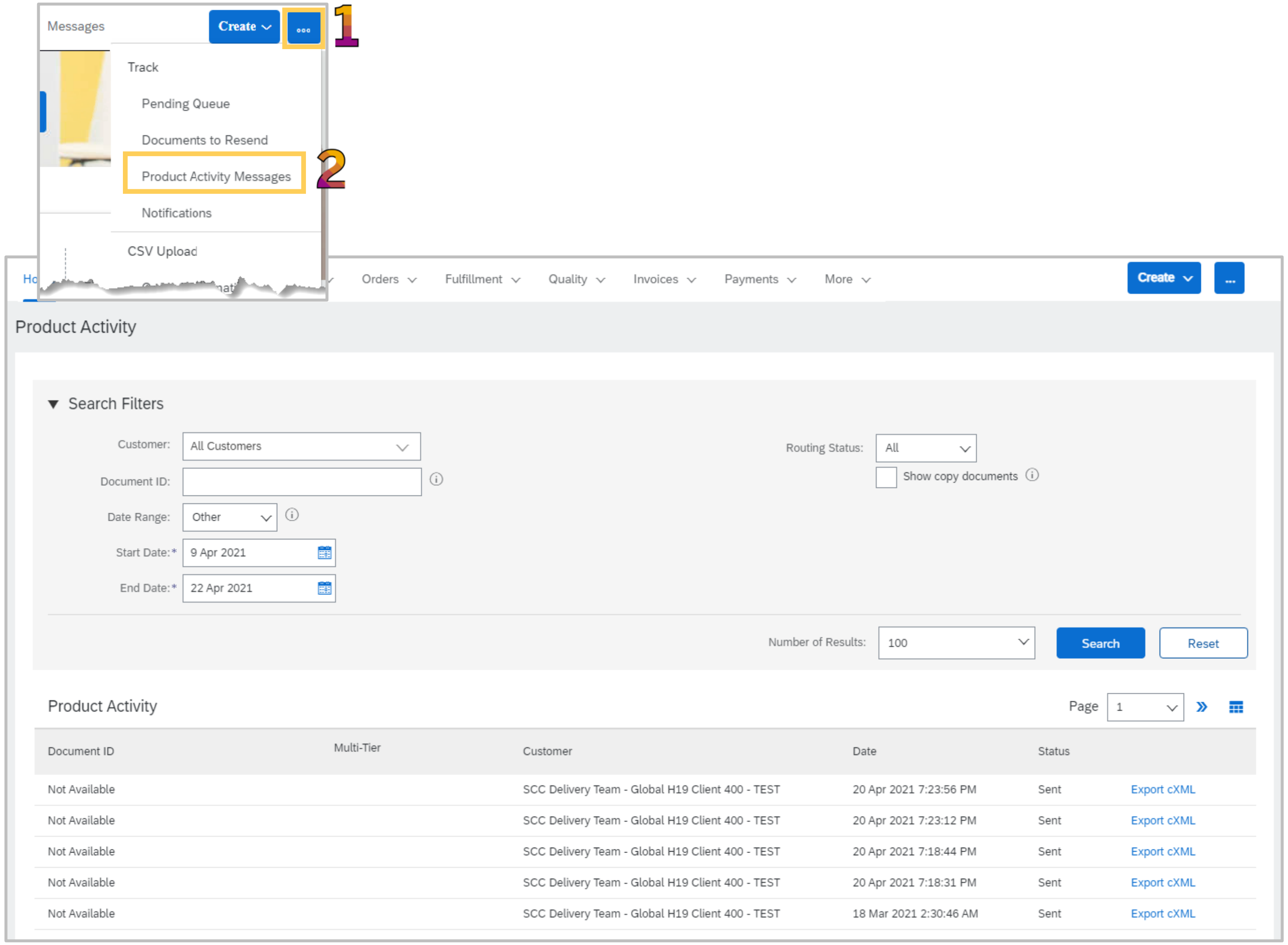
Only Suppliers that use cXML can access the information on the Product Activity screen

The status of the Product Activity document is shown

Use Search Filters to locate specific documents for:

- Specific Customers
- Document ID
- Predefined date range in days
- Allows specific dates to be searched
- Routing Status

- **Note:** To enter a date range select "Other" and enter a date range of 31 days or less



Notifications provides suppliers with information when Purchase Orders are update, modified or changed

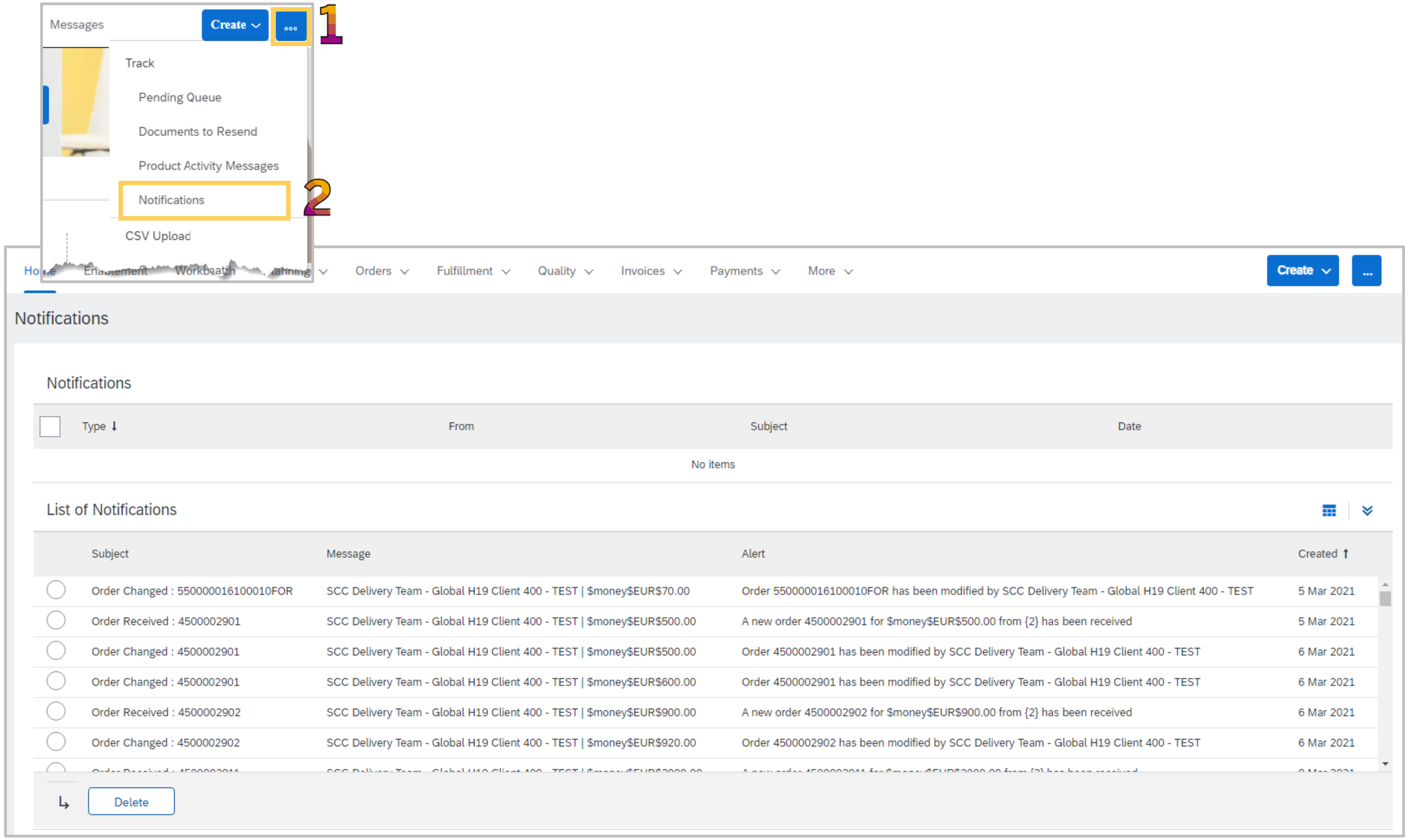
- Notifications is for information only and provides suppliers with a list of notifications relating to documents, there is no action required and notifications can be deleted

Search filters

- To delete with Notifications:

Select the documents by clicking in the radio button ◉ only one item can be deleted at a time

- There is no requirement to delete Notifications from the list



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CSV

The CSV format is used in Ariba to provide make transacting with Buyers easier by providing Suppliers the ability to perform a large upload from their ordering system or ERP

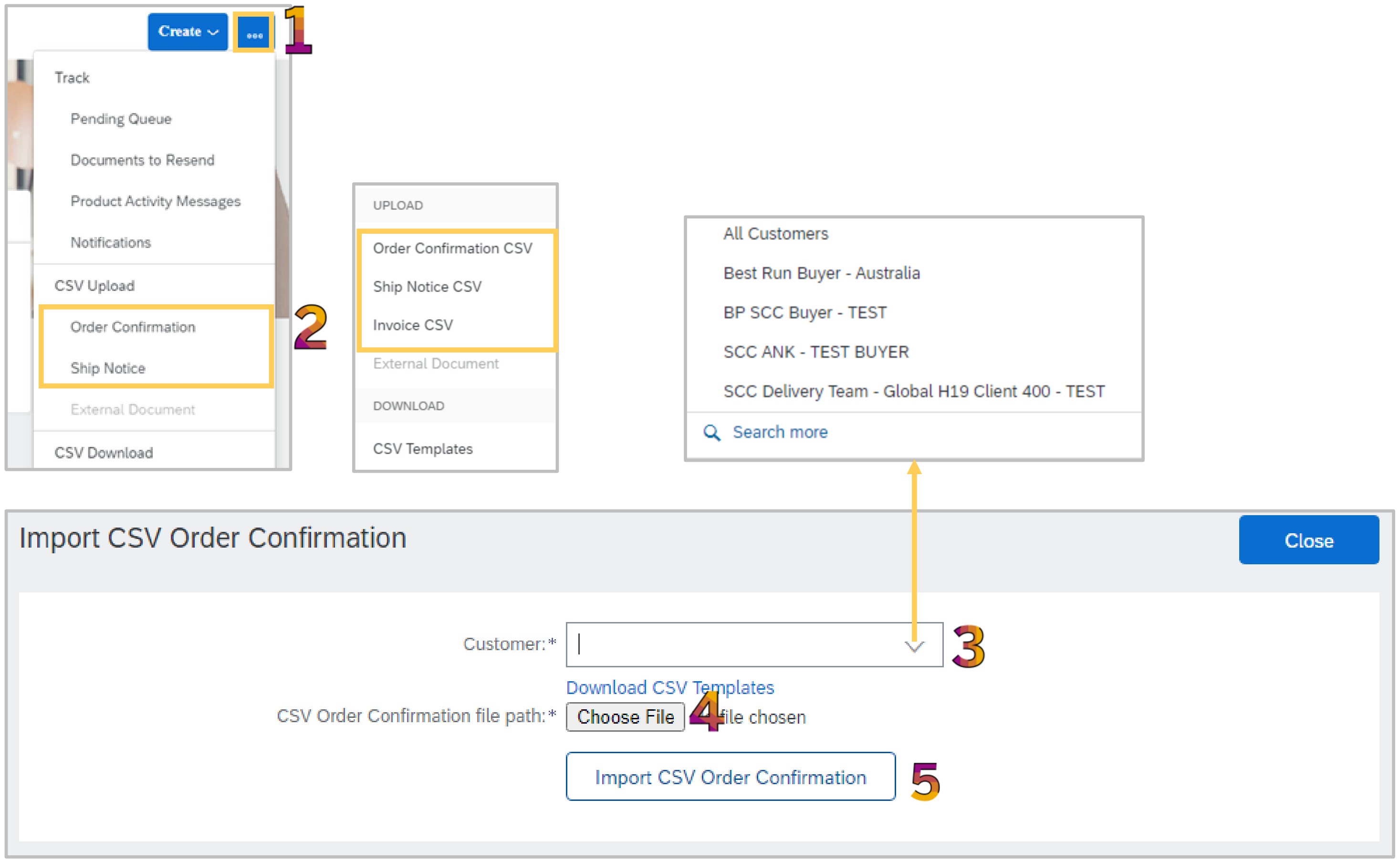
- CSV file Upload must be supported and approved by the Buyer, using this functionality when not approved to will create issues within the Ariba Network but may also have a monetary impact of your business

- A CSV file must be based on the template required by the Buyer

To Upload a CSV:

1. Click on **…**
2. Click on the **CSV Upload** Type
3. Select the **Customer** you are uploading the CSV for using the drop down list
4. Click on **Choose File,** Select the file and click on open
5. Click on **Import CSV XXXX**

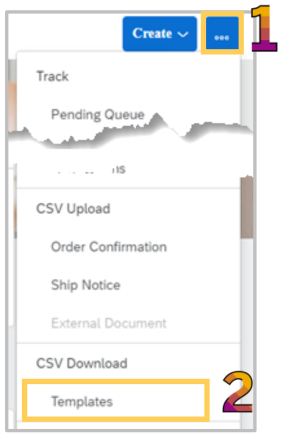
Note: Greyed out items are not available for selection

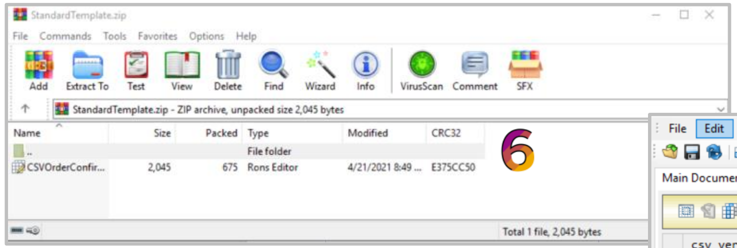


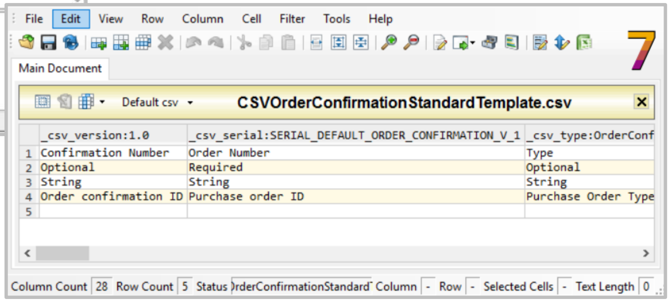
Prior to downloading CSV Templates and using CSV files, confirm that this functionality and process are accepted by your Buyer and is part of transacting using the Ariba Network.

There are **two** types of CSV Templates:

- Standard Templates – based on Ariba Network best practice information
- Customer Templates – updated to include Buyer specific fields when required

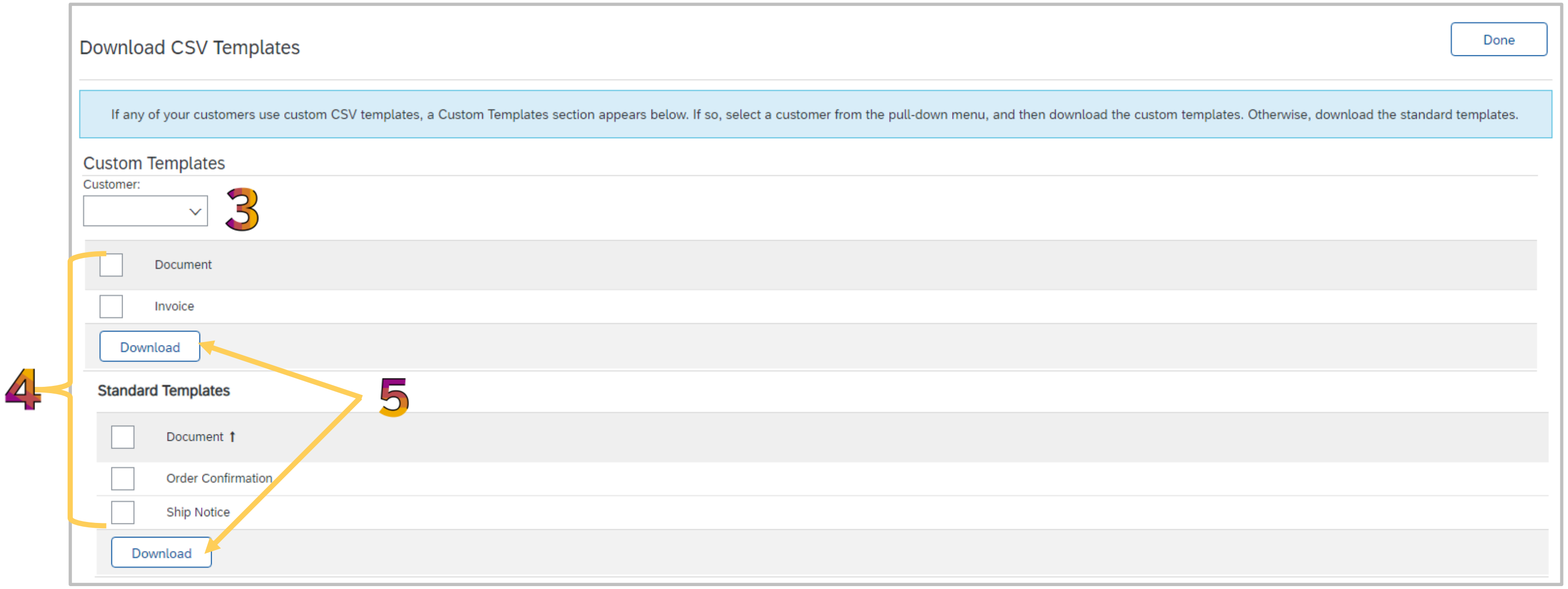






To Upload a CSV:

1. Click on **…**
2. Click on the **CSV Download Templates**
3. Select the **Customer** you are uploading the CSV for using the drop down list
4. Click the template you wish to download
5. Click on **Download**
6. Locate the download icon on the bottom of your screen, click to open, the screen is displayed
7. Click to open, save to access and add information prior to upload



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Excel Files

Excel files are used by Suppliers to provide large amounts of data from their ordering system or ERP to their Buyer

Only use this process if it accepted by your Buyer

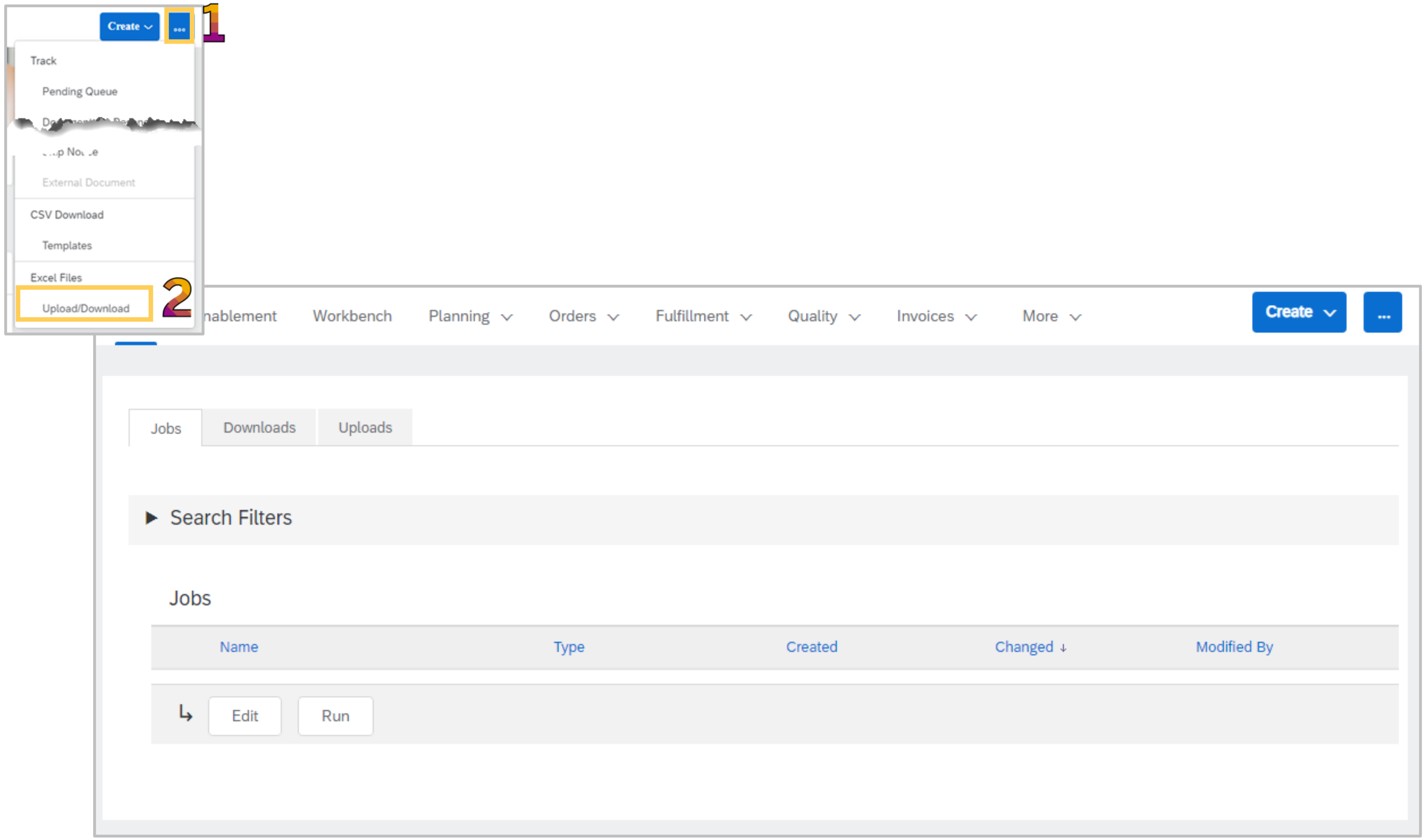
- The upload/download functionality is for Suppliers to perform mass uploads using Excel format files that are specific for transacting using Supply Chain Collaboration
- Supply Chain Collaboration templates contain additional fields such as customer and supplier part numbers and purchase order revision level

In order for Suppliers to transact using Excel Files they will need support and approval to do so and are for mass uploads of information not currently supported by CSV file upload such as Invoicing

There are 3 Tabs in the **Upload/Download** selection, they are:

- **Jobs** – create, edit and run jobs
- **Downloads** – lists the files extracted during the Jobs ***run*** process
- **Uploads** – templates for available upload/download types

- **Note:** Refer to the applicable guide for specific processes and each different type of mass upload will contain different fields to set parameters

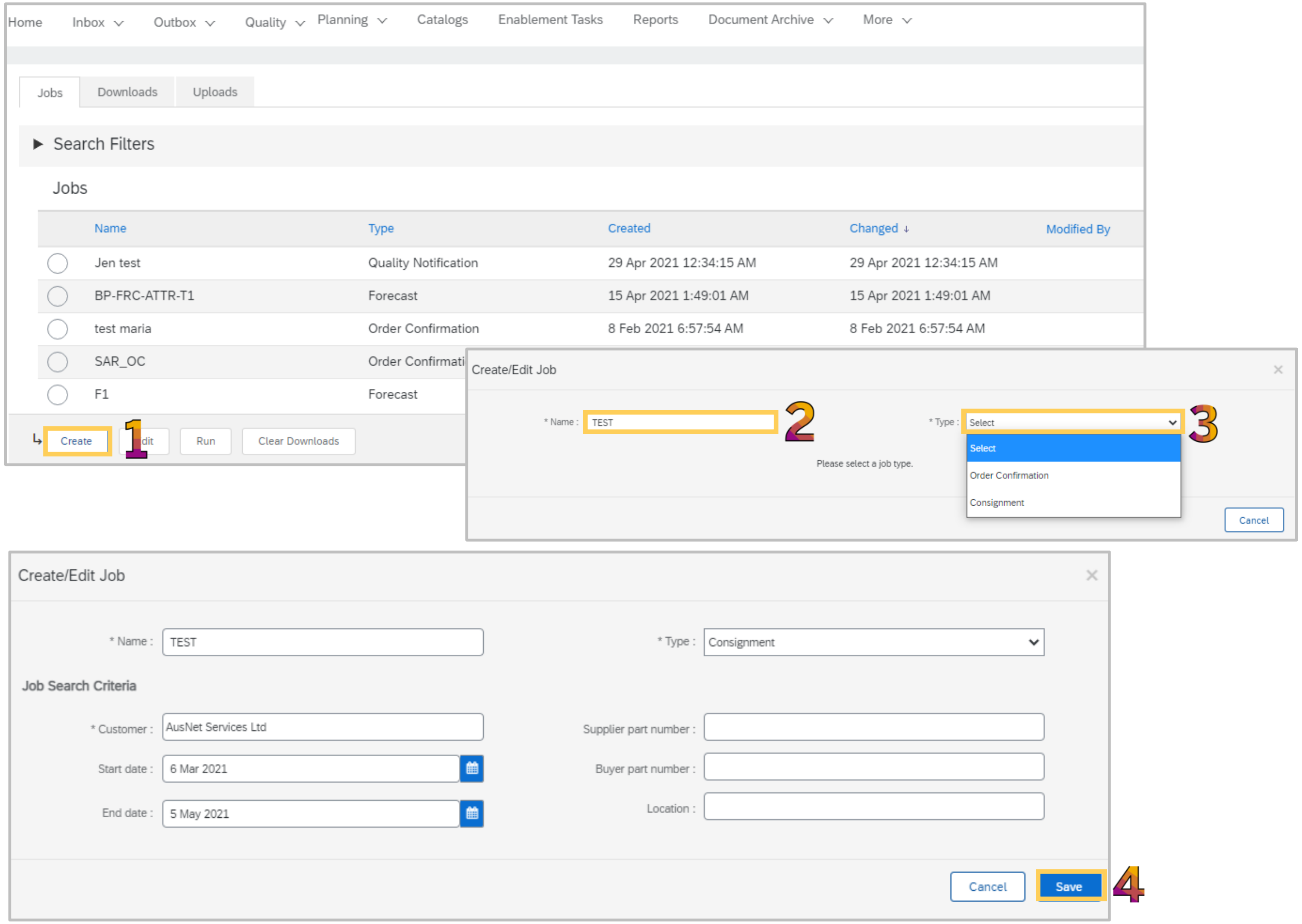


The Jobs tab is the tab that is displayed when Upload/Download selection is made from the drop down list

- Jobs are created based on the parameters set by the user
- The Types of jobs available are based on the Buyer requirements
- Job types once created and be edited or rerun
- Further options are displayed based on the selection made
- A Job needs to be created for it to appear in the Downloads Tab

1. Click on **Create**
2. Enter a job **Name**
3. Select the **Type** of job from the drop down
4. Click on **Save**

- The job will appear in the screen



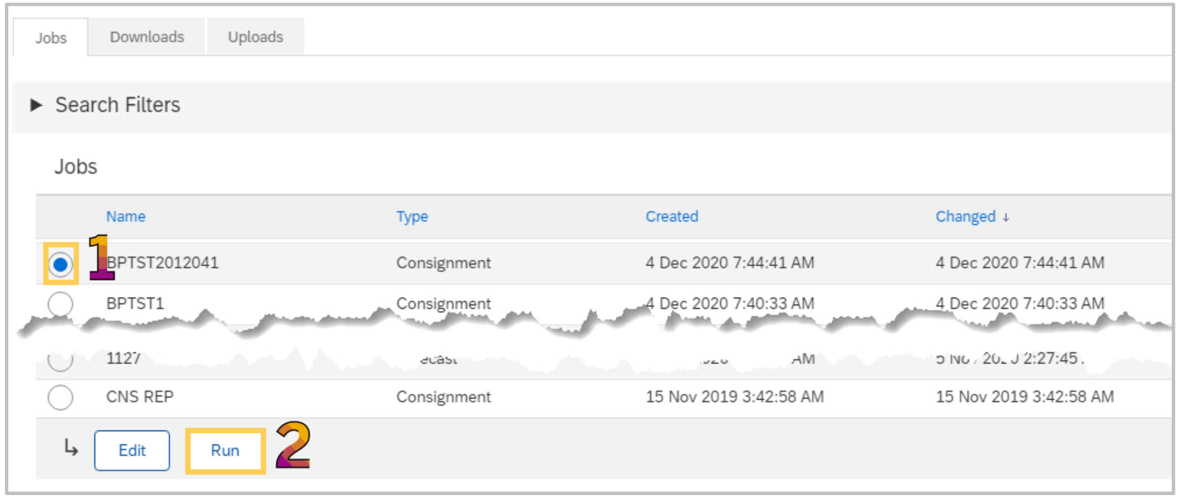
Use run job after a job has been created and you wish to view the information

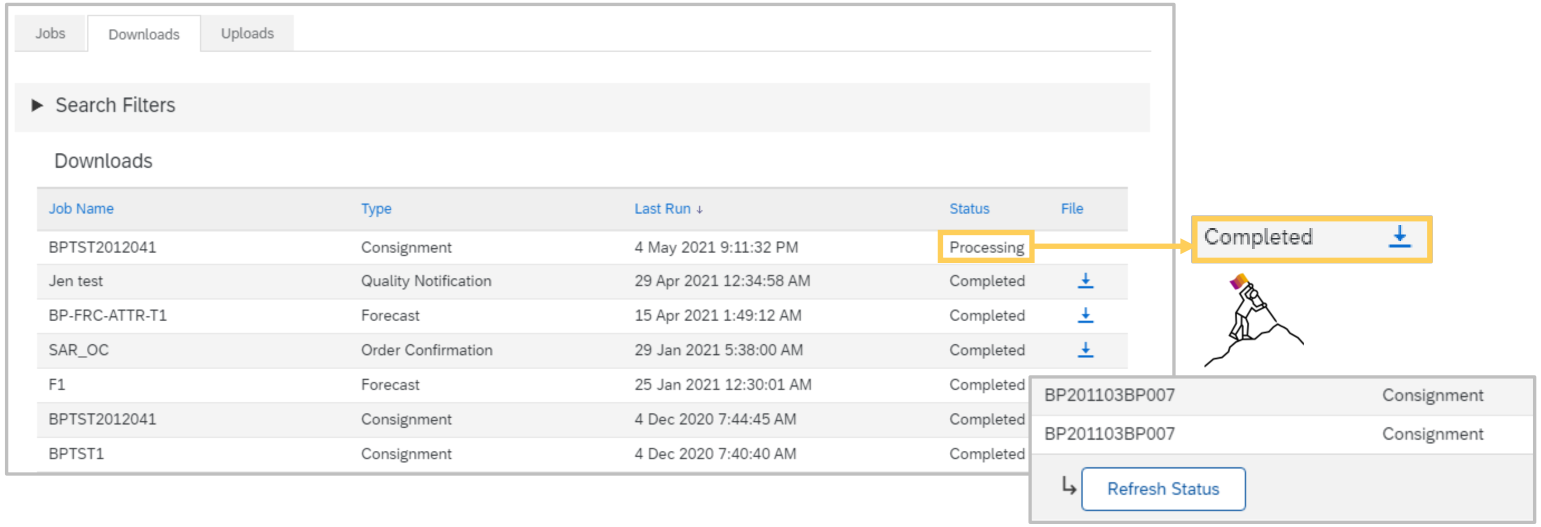
The Jobs tab is the tab that is displayed when Upload/Download selection is made from the drop down list

1.Select the Job you wish to run

2.Click **Run**

- The Downloads tab screen will be displayed with a status of processing
- The length of time varies depending on the amount of data
- Click on Refresh Status is required
- It is ready to download when *Completed* is displayed





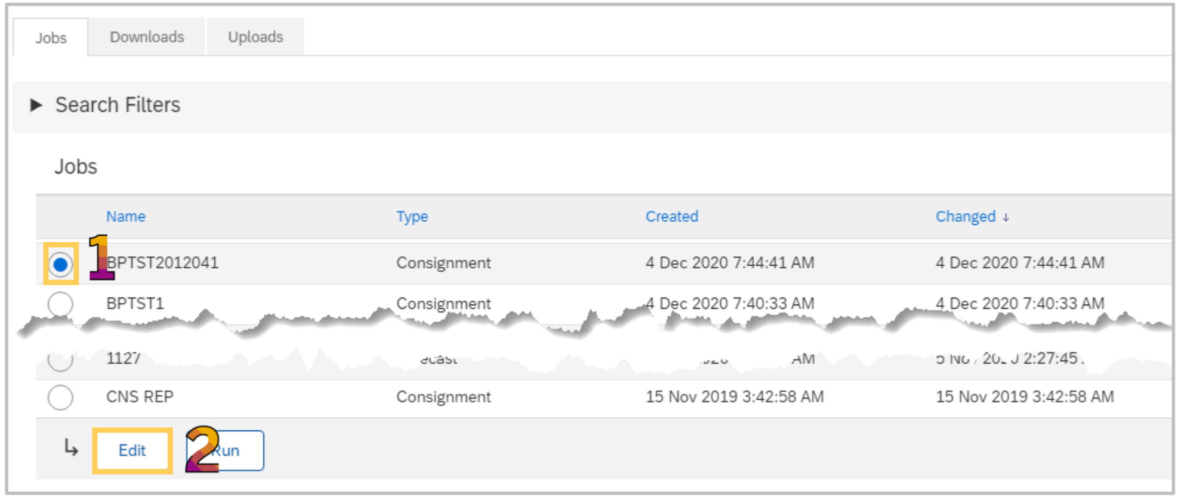
Use Edit a job when you have already created a data set and wish to extract the same data but for different dates, part numbers or locations

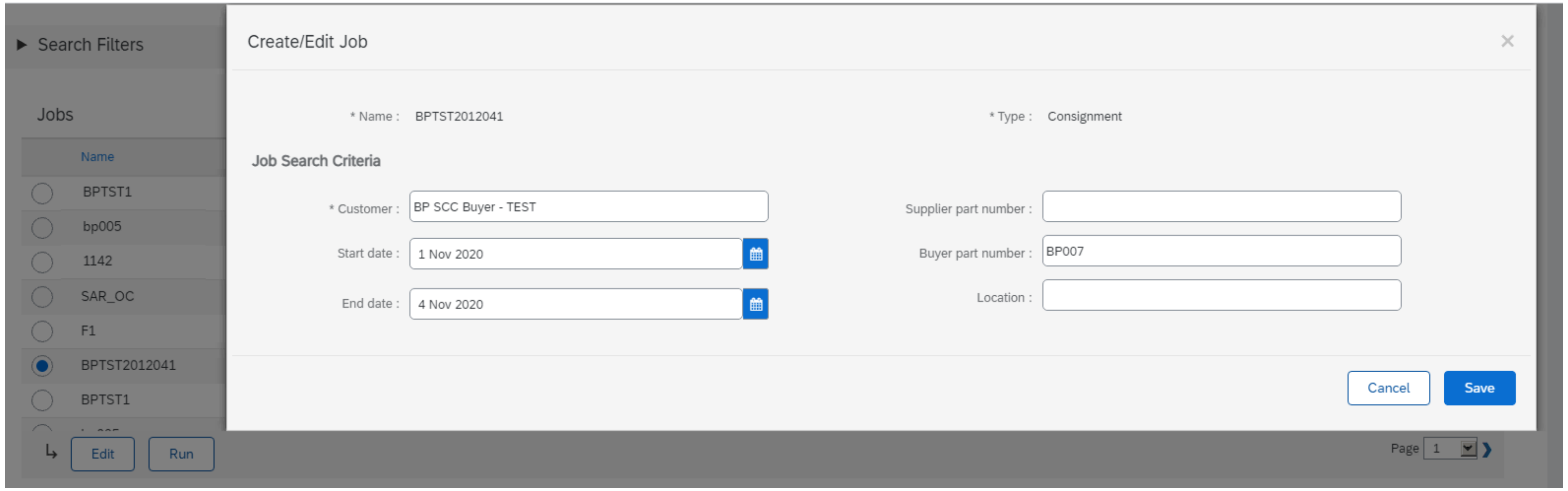
The Jobs tab is the tab that is displayed when Upload/Download selection is made from the drop down list

1. Select the Job you wish to run
2. Click **Edit**

- Update the required fields

3. Once all edits have been made click on **Save**





The **Downloads** tab shows downloads that have been generated

- Only jobs with a complete status can be downloaded

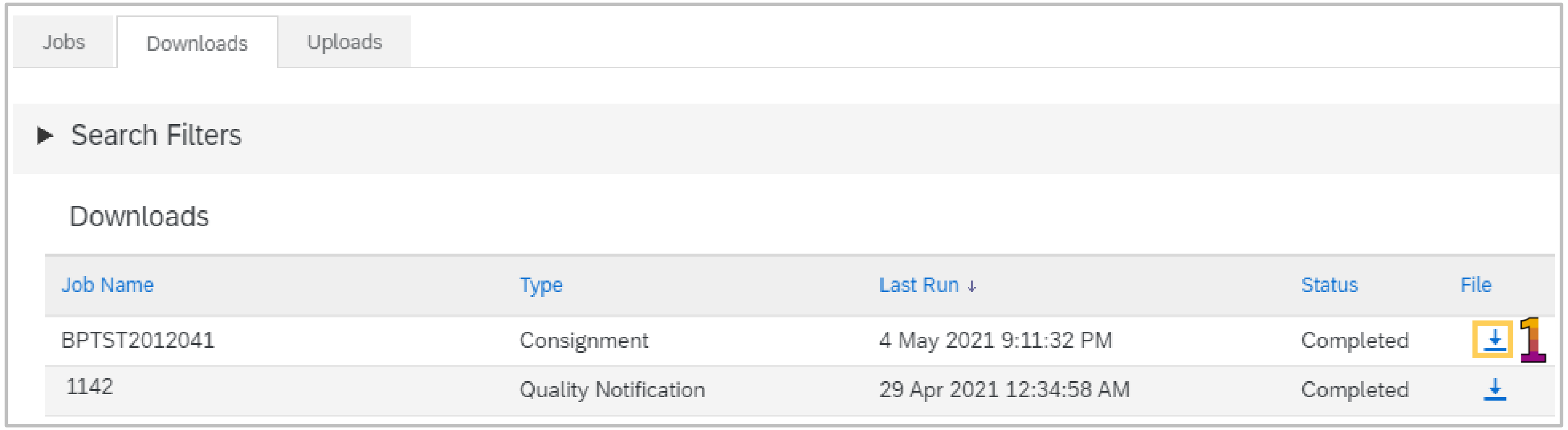
1. Click on **File** next to the job you wish to open
2. The Excel file will open at the bottom of the page, click to open

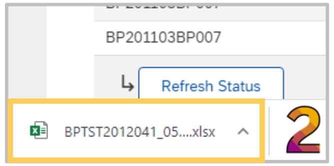
- The Excel spreadsheet is displayed

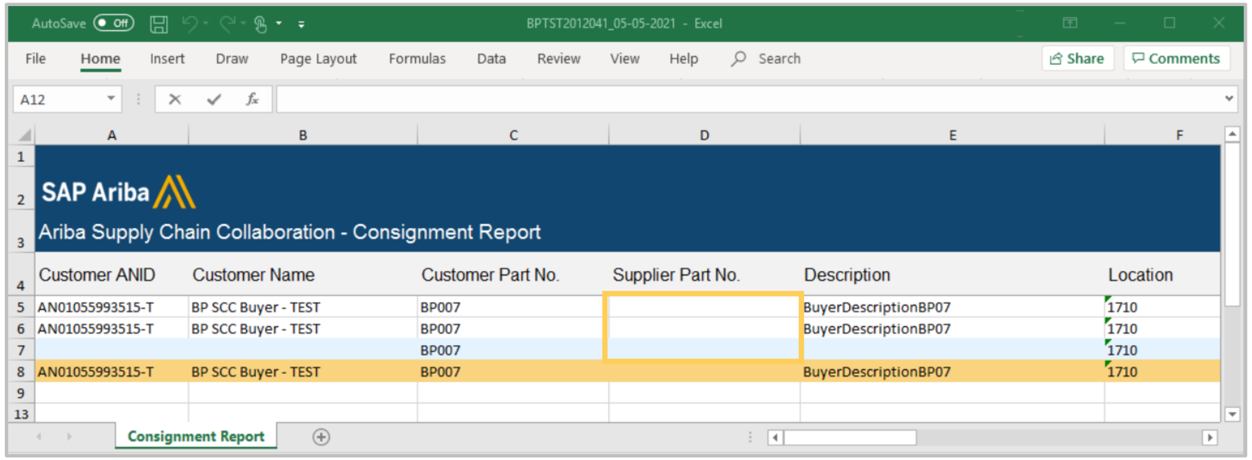
3. Information is added prior to upload based on the Buyer requirements

- **Note:** Do not add or remove columns from the downloaded job

- Information can be added, however all mandatory fields must be completed, the mandatory fields are based on the information contained within the applicable guides







Upload Tabs Information

The **Uploads** tab shows a list of the uploads you have loaded into the Ariba Network

1. **Status** of the upload
2. **File** that can be downloaded
3. **Log** to identify the errors generated during the upload process

Jobs | Downloads | Uploads

▶ Search Filters

Uploads

Name	Type	Last Uploaded	Status (1)	File (2)	Log (3)
BP-FRC-UPL-ATTR	Forecast	15 Apr 2021 1:52:32 AM	Completed	⭳	⭳
SAR-OC	Order Confirmation	29 Jan 2021 5:42:49 AM	Failed	⭳	⭳
1130	Forecast	5 Nov 2020 2:30:58 AM	Completed With Errors	⭳	⭳
Forecast Excel	Forecast	20 Nov 2019 8:24:14 AM	Failed	⭳	⭳
MV Test	Manufacturing Visibility	5 Nov 2019 1:57:22 AM	Failed	⭳	⭳
OC Reconf	Order Confirmation	30 Oct 2019 7:37:01 AM	Completed With Errors	⭳	⭳
RO test	Replenishment	30 Oct 2019 3:09:42 AM	Failed	⭳	⭳
price enhanc int enblmnt	Order Confirmation	22 Oct 2019 12:55:27 AM	Completed	⭳	⭳

↳ Upload | Refresh Status

Page 1 ❯

Help Options

There are a number of help options available to Suppliers, there are two types of help:

- **Generic Help** – that is general in nature about SAP Ariba
- **Buyer Specific** – that provides information specific to transacting with the Buyer

The options are:

- Active Onscreen Help – provides users with information on the screen, only available on the Seller Dashboard/Home page and Workbench
- Help Topics Pane – provides users with access to different types of help, the help provided in the pane is general in nature and can be a document, and FAQ or a video clip
- Help Centre Home Page – provides users with a query entry field to provide self help options and is the first tab
- Guided Help – takes users through possible options relating to their query
- Documentation & Learning – options and access to documentation and video clips
- Contact Us – users completing the Contact Us form will be directed to the help that best suits their query and the type of account they have
- Supplier Information Portal (SIP) – provides users with information that is specific for transacting with a Buyer using the Ariba Network

Onscreen help allows users to identify the areas they require help with while not leaving the Seller Dashboard/Home page

To activate onscreen help:

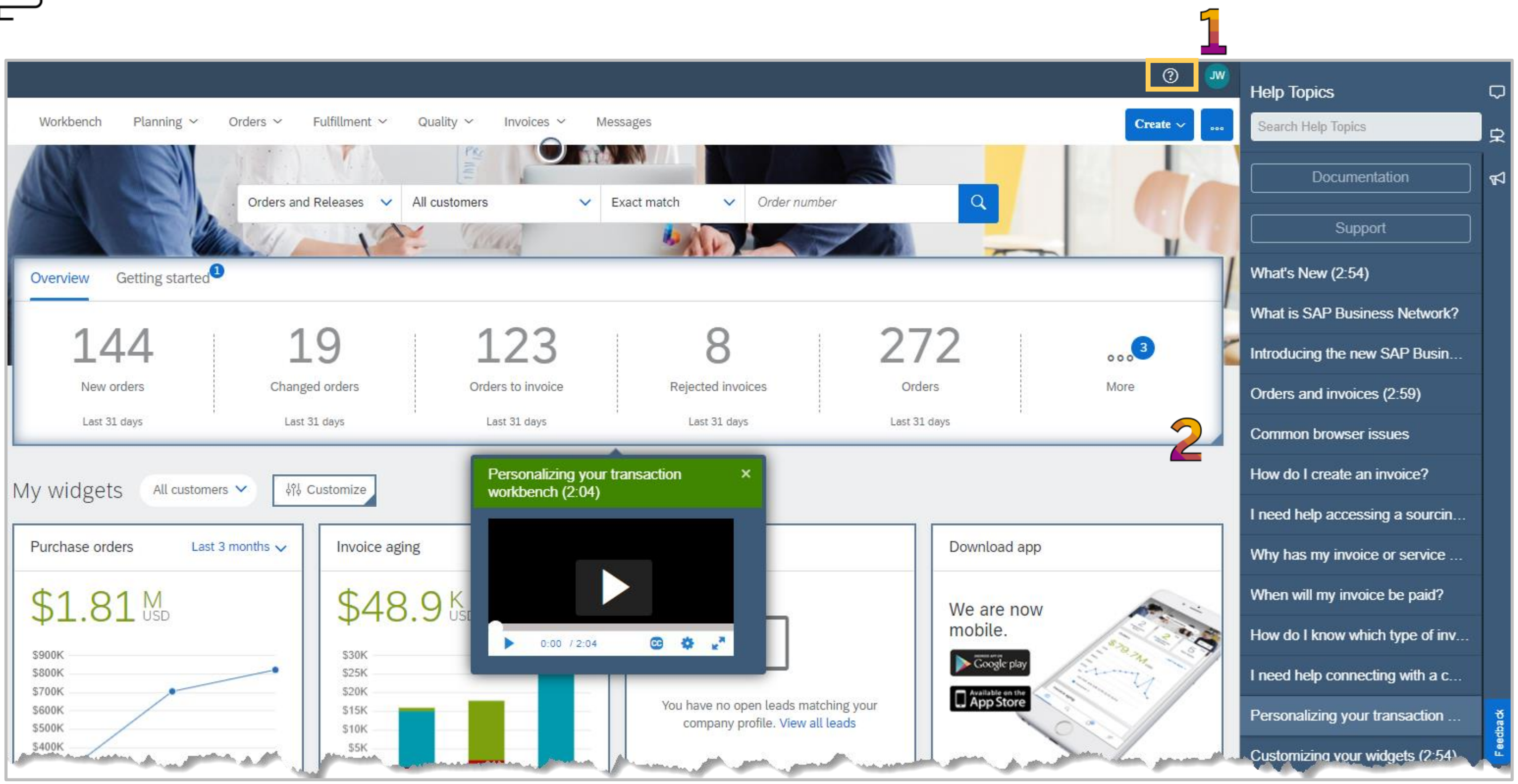
1. Click on the

Blue boxes will appear around each section

2. Click on the on the corner of the field further help is required with, only sections with the provides help information

The example shows a training clip that a user can watch there are some fields that will contain steps others with information only

Note: the available help is displayed in the Help Topics Pane



Help Topic Pane

Note: All information contained within the Help Topics Pane is generic, to access Buyer specific requirements for transacting using the Ariba Network, refer to Accessing the Supplier Information Portal

The options available on the Seller Dashboard/home page:

1) Enter a search topic into the **Search Help Topics field**

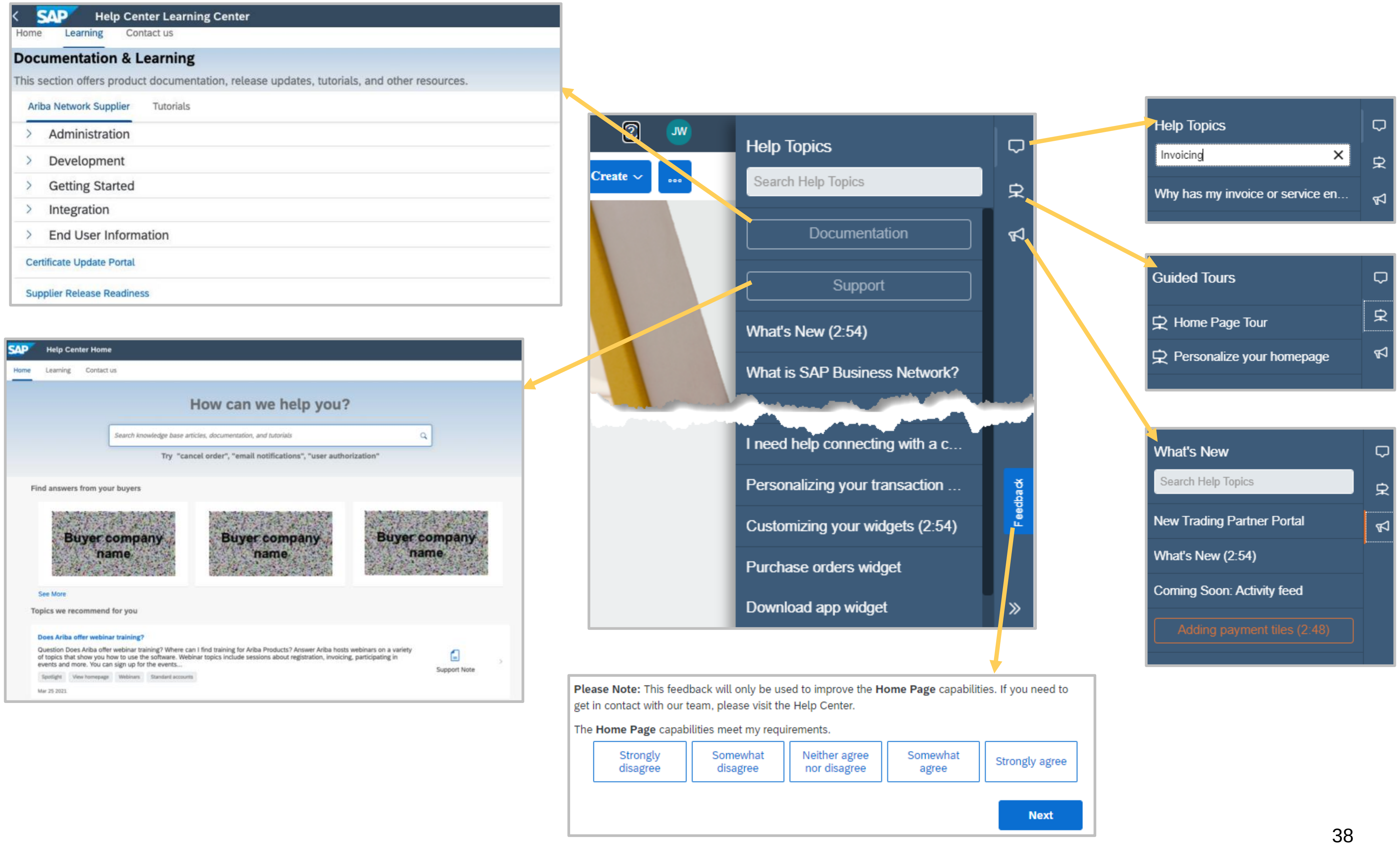
2) Access **Guided Tours** on the Seller Dashboard/Home page

3) See What's New

4) Click on **Documentation** to locate generic documents to complete items in the Ariba Network

5) Click on **Support** to receive Hep Centre assistance

- **>>** Closes the Help Topics pane
- Feedback can be provided on the Homepage

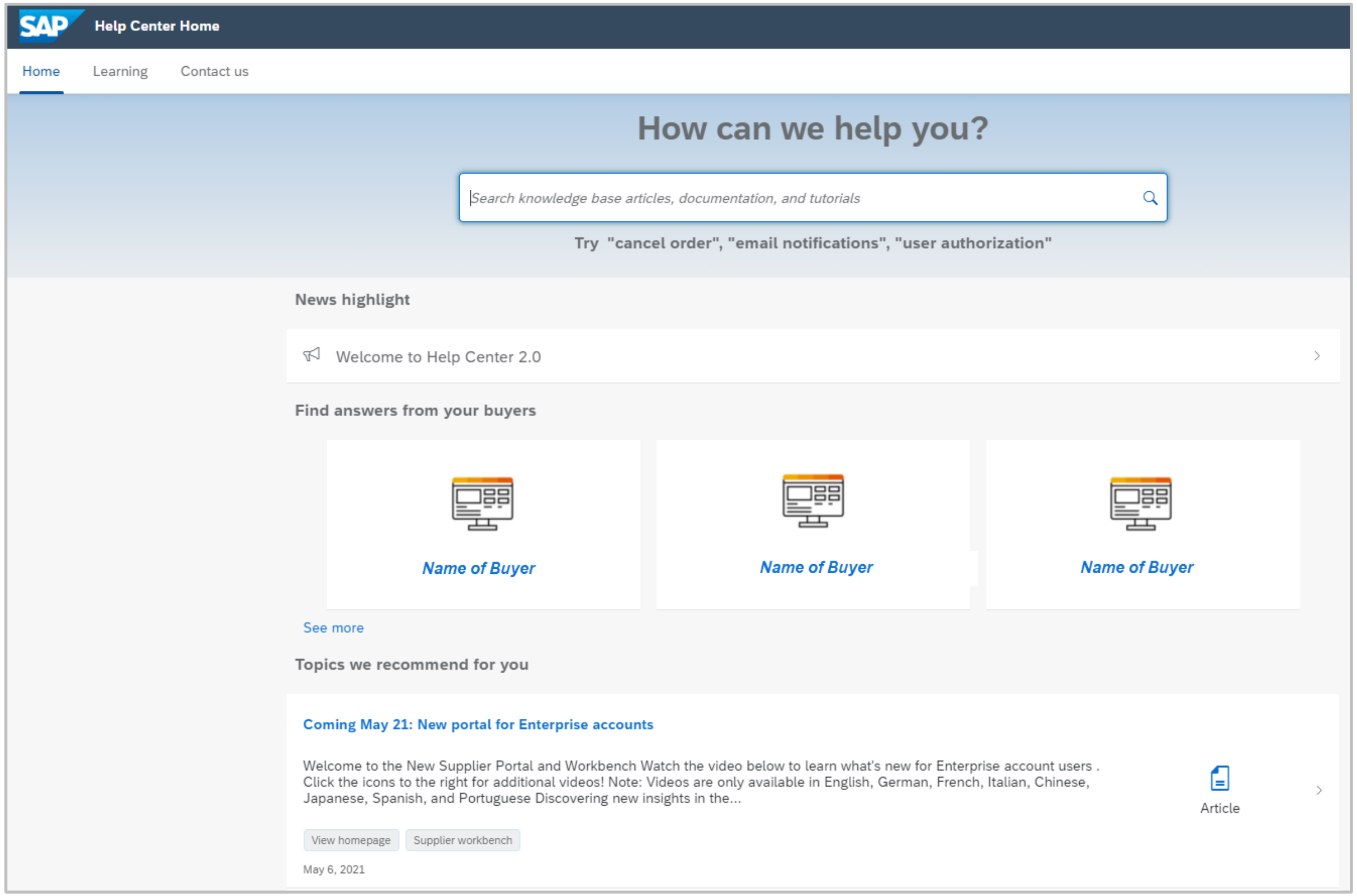


The **Help Centre Home** page gives suppliers access to further information, documentation and options for help

There are 3 tabs available:

- **Home** – Provides access to Buyer Supplier Information Portals
- **Learning** – provides access to generic Ariba Network documentation and videos
- **Contact Us** – complete the form to gain access to other options for assistance such as:
  - Email
  - Return Phone call
  - Chat

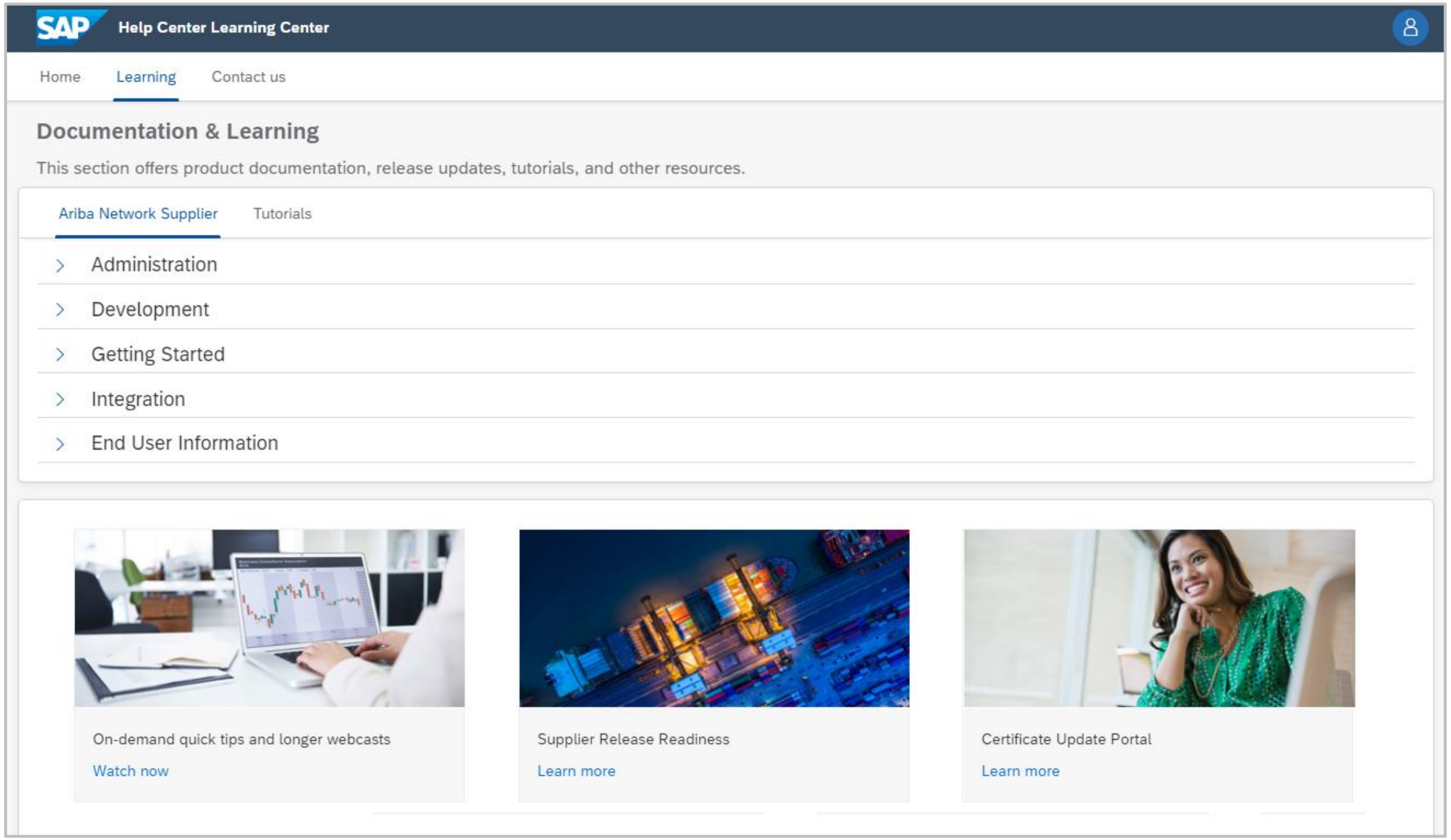
- **"How can we help you?"** is displayed, enter your query into the field, to activate the search click on the magnifying glass ( ) or press Enter on your keyboard



Documentation & Learning

On the **Documentation & Learning** tab is browsable Product documentation from help.sap.com

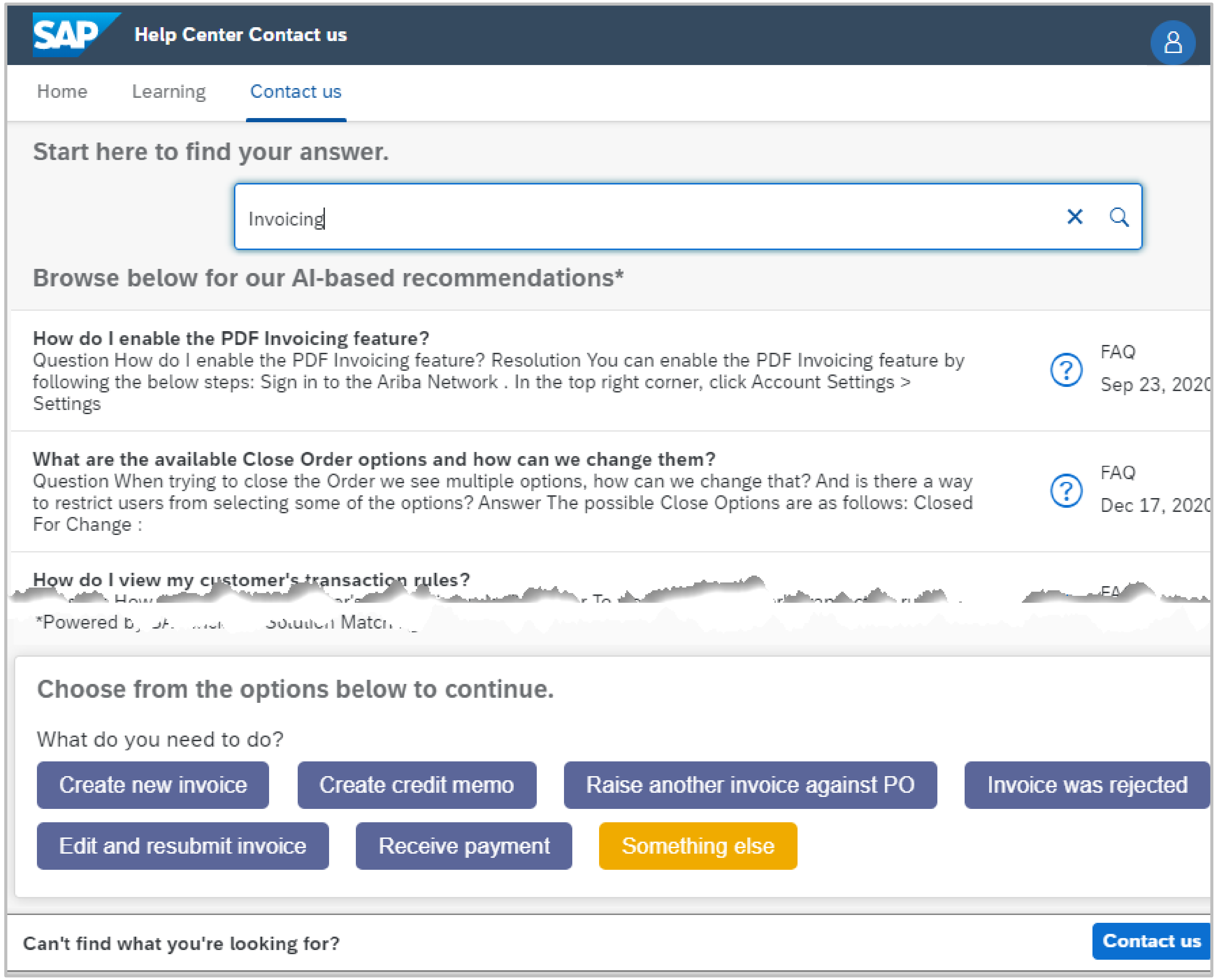
- Provides quick access to certificate updates and information about past changes
- Access to updates for “Release Readiness” which contains content for Suppliers on a quarterly basis, providing information about changes, enhancements and functionality
- Suppliers can also access On-Demand success sessions that provide further information on features and functionality of the network
- Click on the required folder where any subcategories will be displayed, select the required information
- Success Sessions are on-demand sessions that suppliers can watch at a time that suits



The **Contact Us** tab provides access to Guided Help (Assistance) which provides Suppliers with options to their query based on the information entered into the "How can we help" field

It also starts the Service Request (help) process that identifies the recommended help options based on algorithms, account type and best help option

- The recommendation are matched to the words entered in your search based on previous Frequently Asked Questions (FAQ's)
- The blue bubbles provide access to further information on how to correct or perform processes associated with the query you have entered
- Anything in blue can be selected to provide further information
- **Contact us** opens a form with a series of questions to identify the support that is required



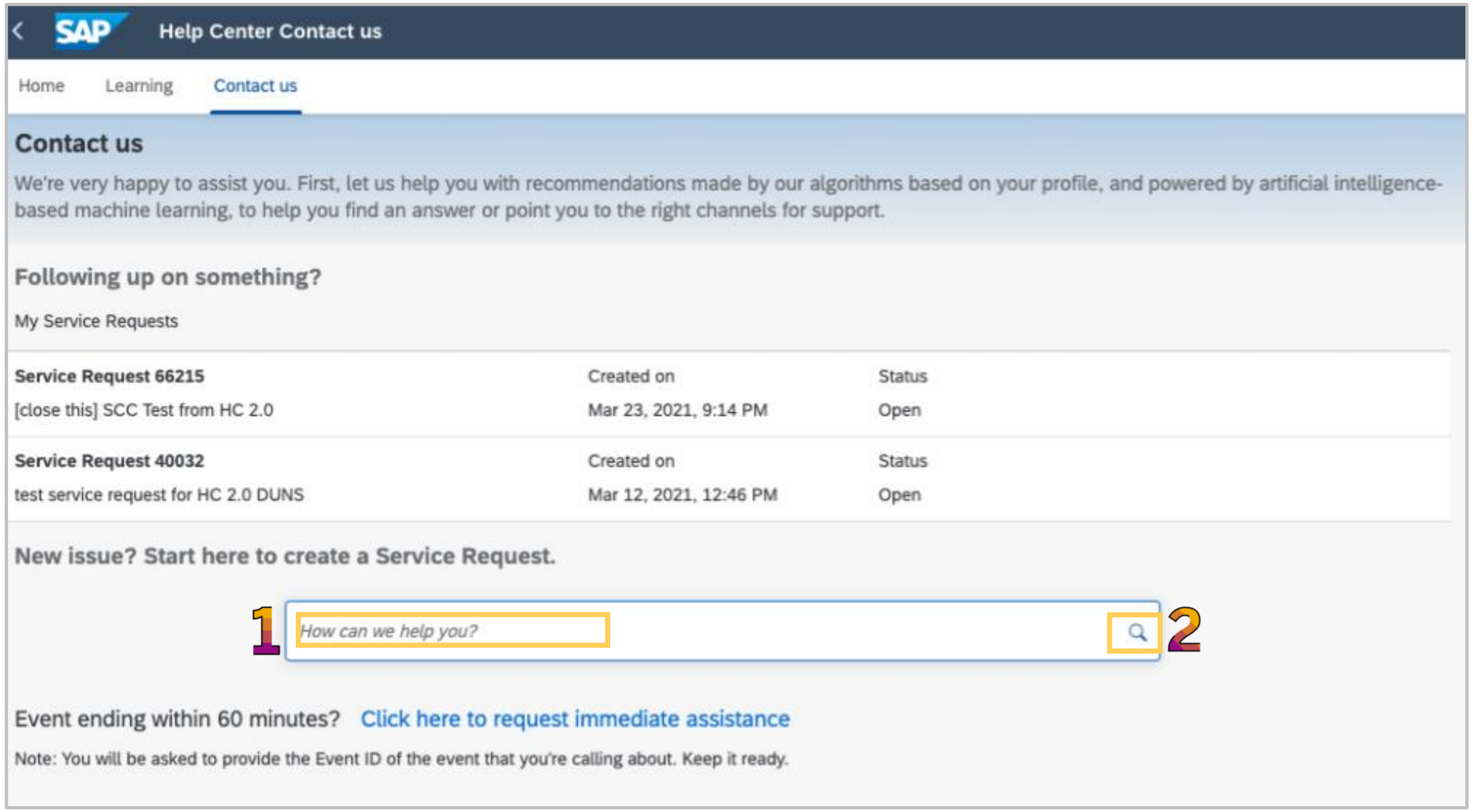
The **Contact Us tab** provides access to:

- Open Services Requests
- Closed Services Request
- Access to Help Options based on information entered into a form
- Four Sourcing Suppliers Only priority access for supplier who have an RFQ or RFI ending in 60 minutes

- Service Requests are call that have been made to the Help Centre about issues, functionality or system issues

1. To create a new **Service Request**, enter the type of service request you require
2. Click on the to start the process

- If you have an Event ending within 60 minutes and are unable to provide a quote, click on the **"Click here to request immediate assistance"**



Contact Us – Accessing further help

After clicking on the **Contact us** you can access other help options

1. Click on the **Contact us** button on the bottom of the Contact Us tab screen

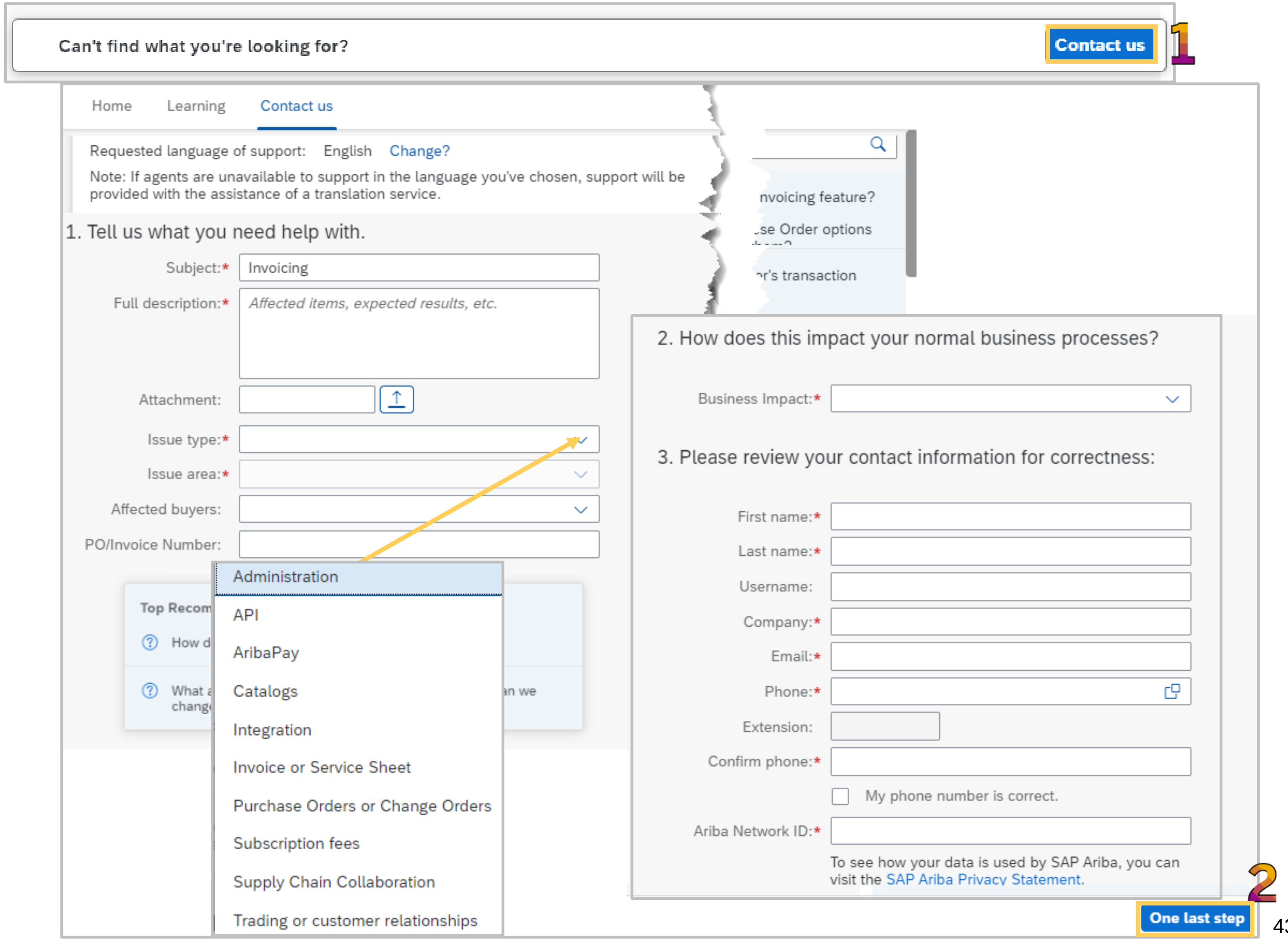
   - The Contact Us form is open on the screen, many fields will be pre-populated based on the information previously captured, however review the information on the form and enter information into all fields that have an asterisks

- All fields with an asterisks must be completed you cannot move onto the next step in a process without all fields with an asterisks having information provided

- A Recommendations Pane is displayed, this provides information based on the query entered

Note: For Supply Chain Collaboration Suppliers (Direct Suppliers) ensure you select SCC from the drop down menu

2. Click on **One last step**

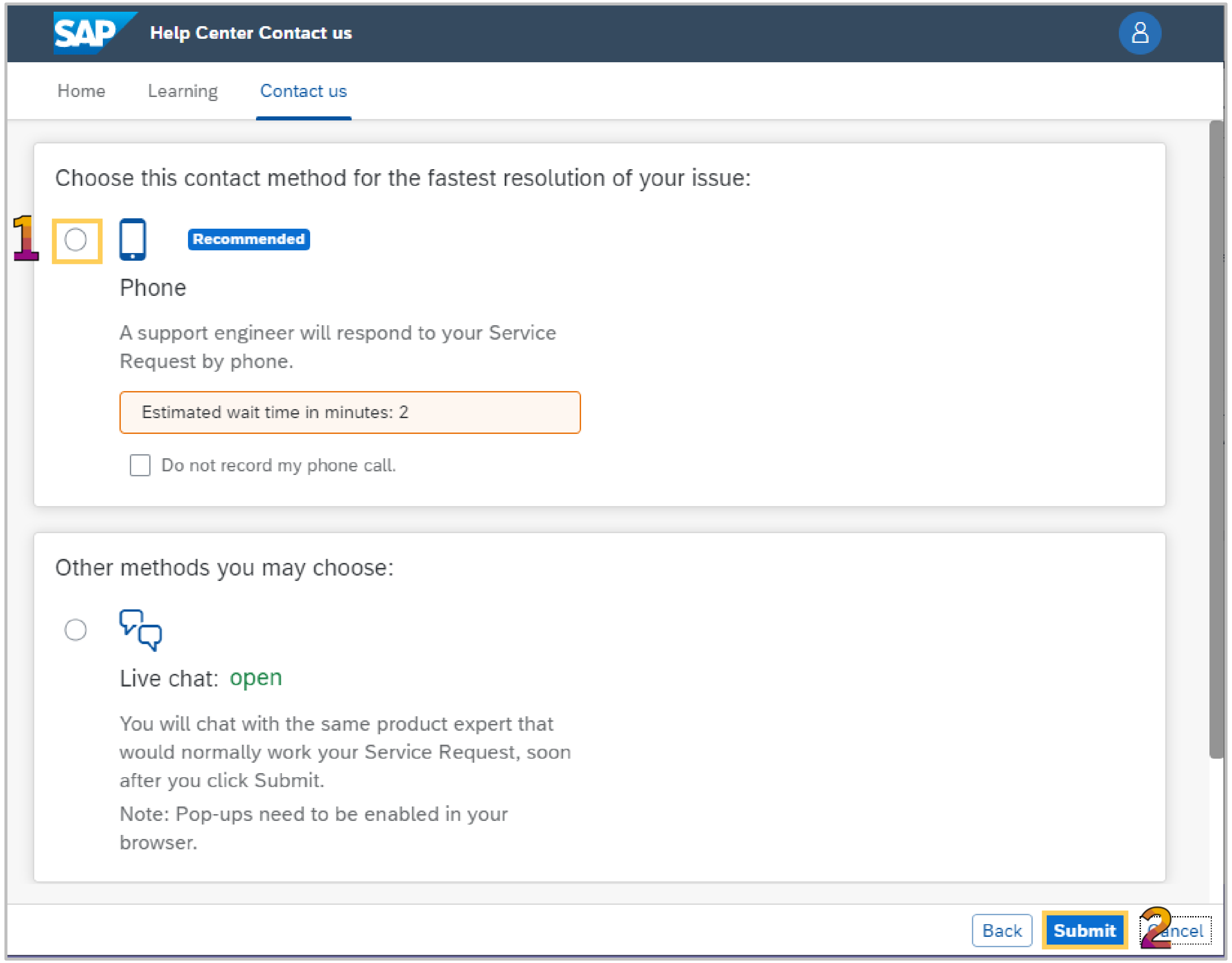


Based on the information provided, Suppliers will be shown a list of customised options indicating the channel that can provide assistance

- The Recommendations are based on the issues type, Supplier type (direct supply source suppliers) and Support Availability

1. Select the method you wish to use by clicking on the radio button
2. Click on **Submit**

- Once you have clicked on Submit, information to access the Help is provided
    - Ensure any attachments required have been provided, use back to add an attachment to the Contact Us form
- If the issue has been resolved or the information has been found to assist click on Cancel

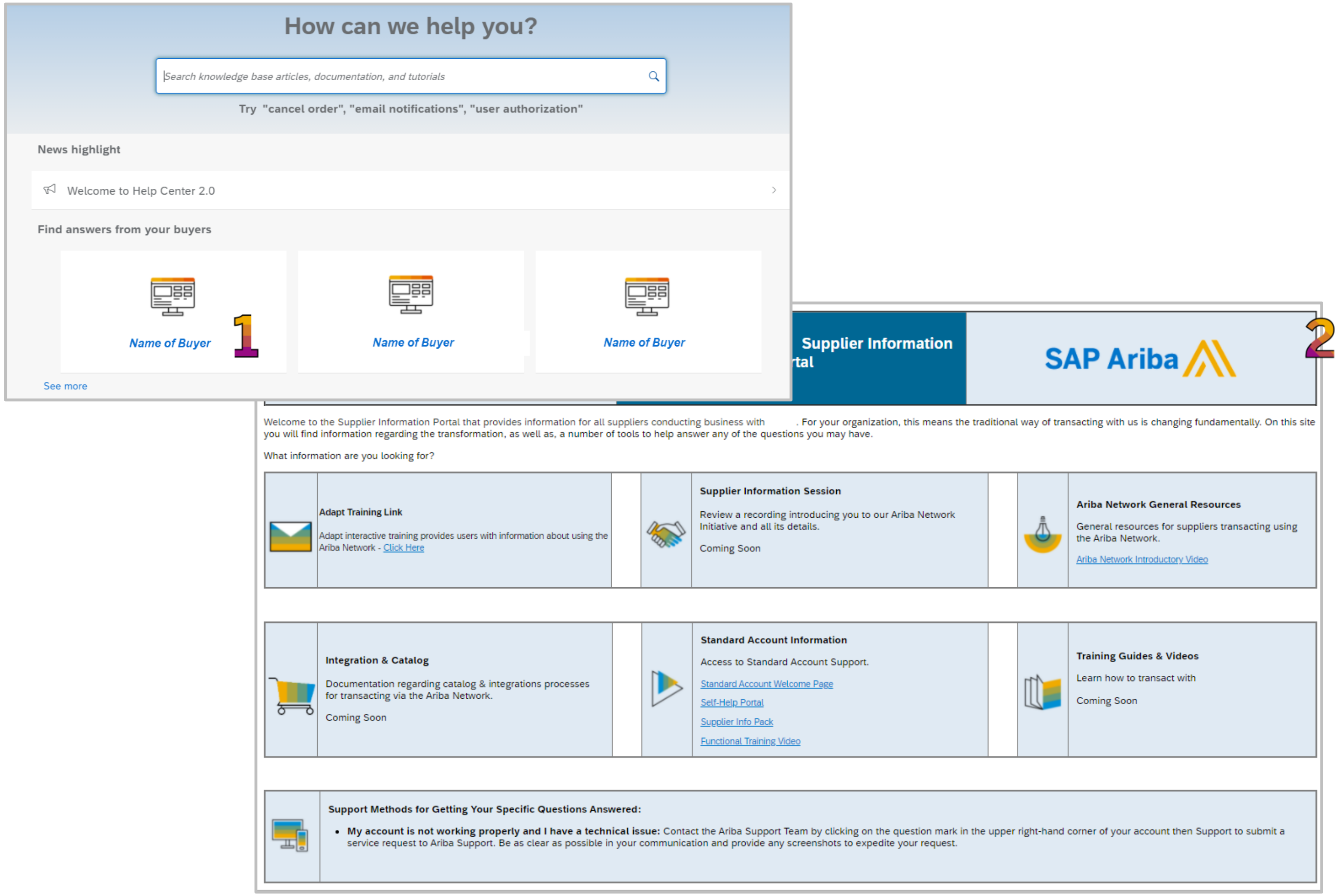


Each Buyer that a Supplier transacts with will have the Supplier Information Portal (SIP) displayed

- The SIP contains information that is specific to transacting with a Buyer

1. Select the SIP required
2. Locate and select the information required

- The SIP provides information that is both generic and specific for transacting with each Buyer
- Each Buyer may have different process requirements
- Links are blue
- ADAPT is a online training for generic processes as may not be displayed
- Summit and Training Sessions can be accessed from the SIP, suppliers can watch sessions using an On-Demand process. A supplier registers to access the content and can watch at a time the suits



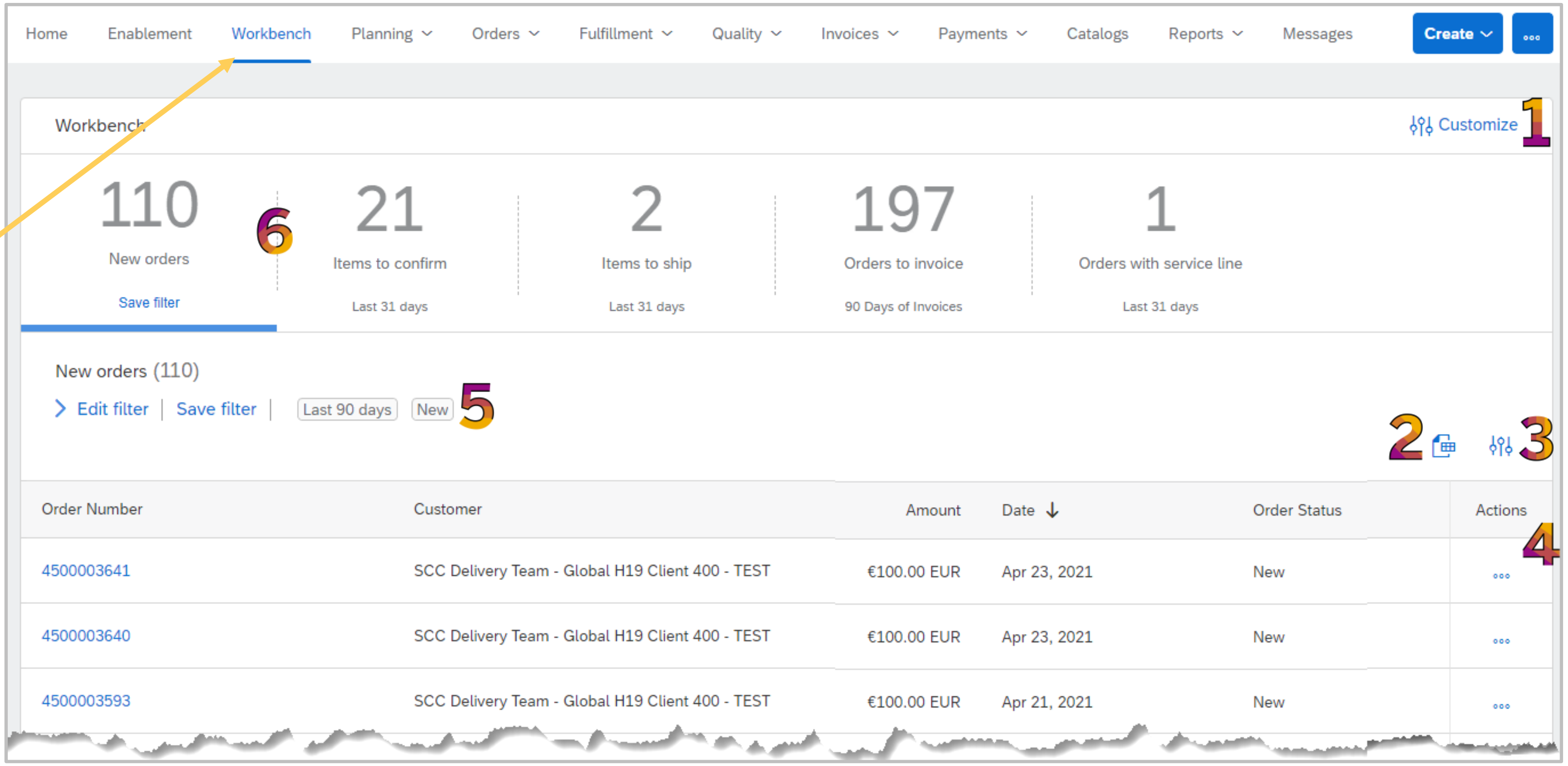
Transactional Workbench

The Transaction Workbench provides one location for users to find documents that relate to their role

- Tiles provide filtered views of information and are customizable, tiles can be created and saved with the ability to name the tile and determine the numbers of days of information to be displayed

- To access the Workbench click on the Workbench tab

1. **Customize** – allows users display the tiles based on their requirements
2. **Export** – allows users to export a specific tiles information to an Excel spreadsheet
3. **Settings** – users can change the settings based on their requirements
4. **Actions** – allows users to perform actions without opening the document first
5. **Active Filters** – indicate the active filters for the tile displayed and the filters attached
6. **Tiles** – allows users to display the information required



Customize the Workbench Tiles

The transaction Workbench allows users to display the information they require for faster access and it can be customized by:

- Customer
- Type of Document or process
- Time frame

Tiles provide a filtered view, from the Workbench Screen:

1. Click on Customize

2. To add a Tile, click on +

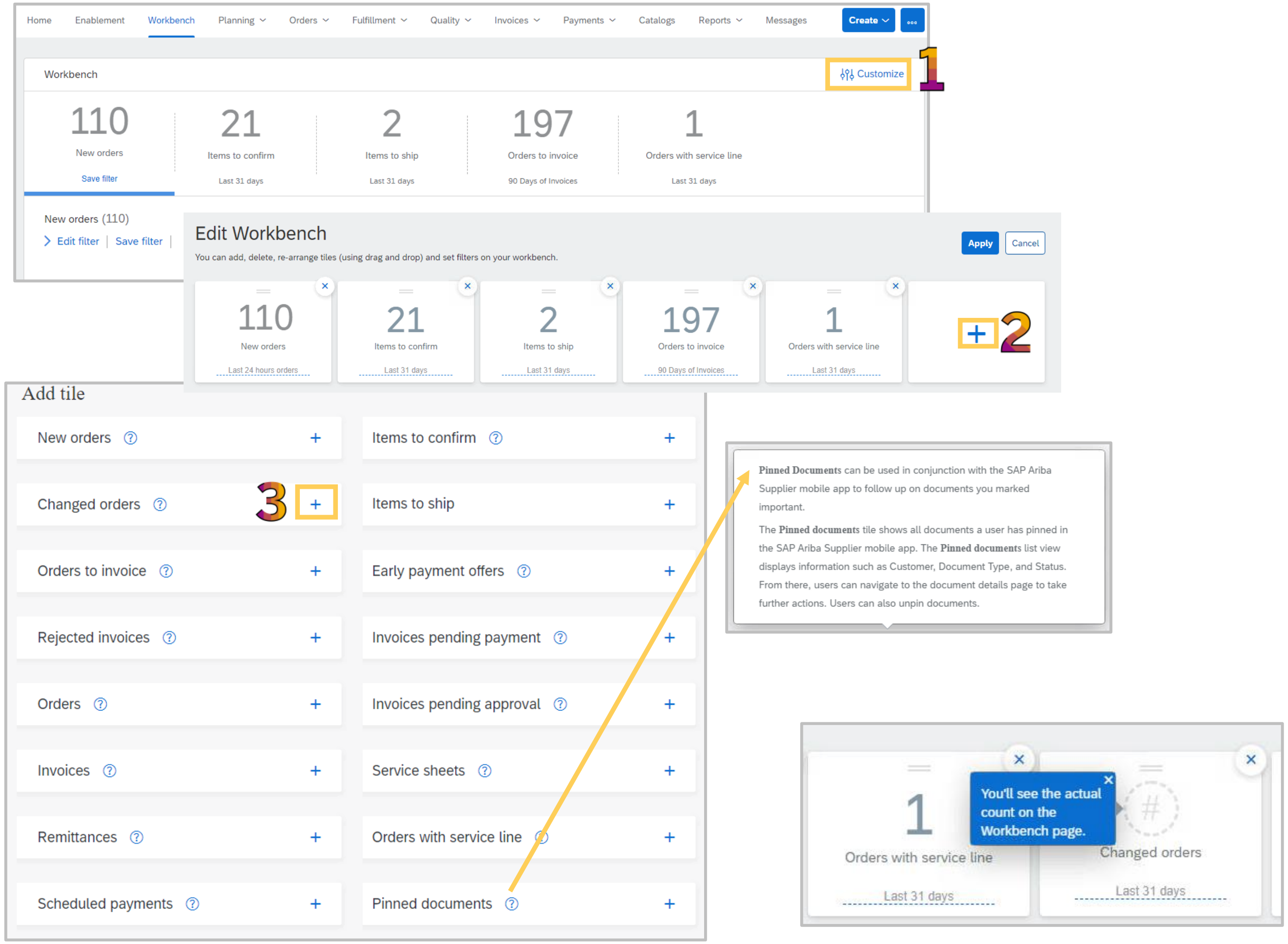
A list of all the available tiles appear,

Note: Multiple Tiles with the same name, for example, New orders and have them for different customers or time periods

The ⓘ provides further information about the tile

3. Click on the + at the end of the tile you wish to add

The Tile is added



When a Tile is added to the Workbench it appears at the end of the list

- Tiles can be moved, hover over the ═ when a hand appears holds down the mouse button and move to the desired tile position
- The information above the dotted line can be changed from the default to reflect something else, for example "Jane's View"

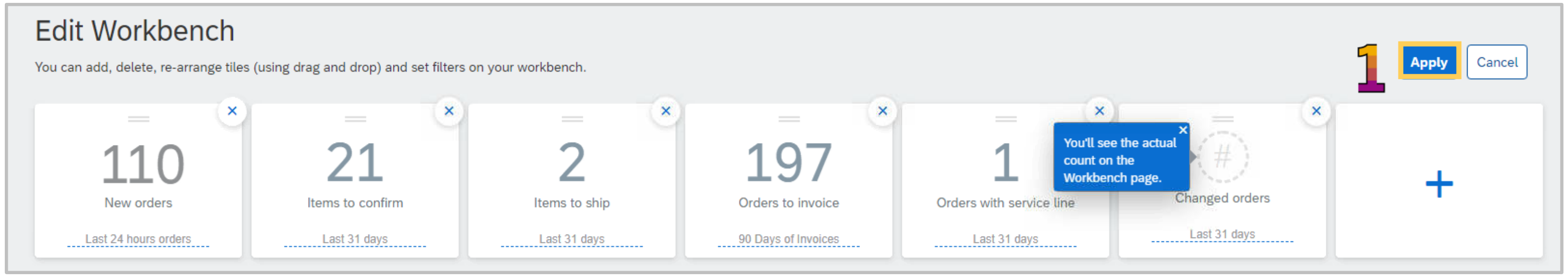
Note: The pop up box indicates that the number of Changed Orders does not appear in the Customize view

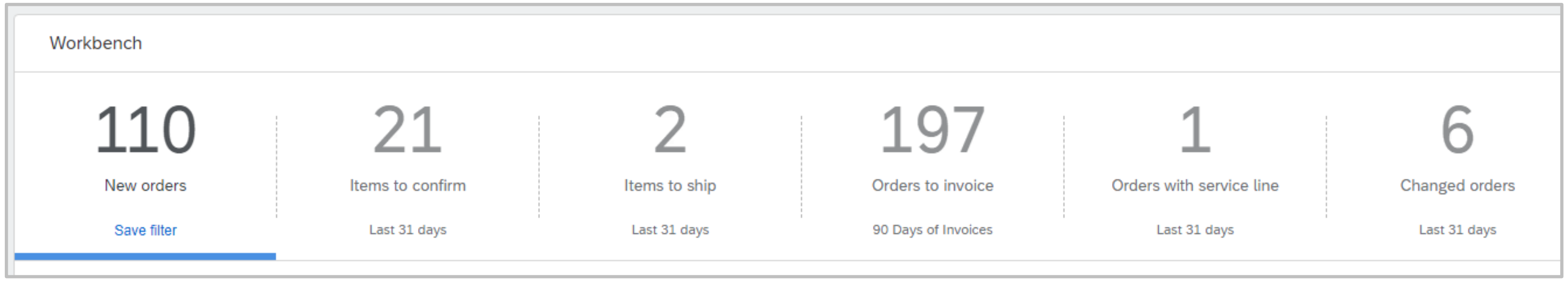
Further Tiles can be added by clicking on the +

To remove tiles, Click on the ×

1. Once you have added and removed the required Tiles, click on Apply

- Drag and drop any of the workbench tiles to re-arrange the order in which they appear and the tile order will appear in the overview bar of the homepage





The information contained within each tile can be exported into an excel format document

1. Click on the Tile to display the information

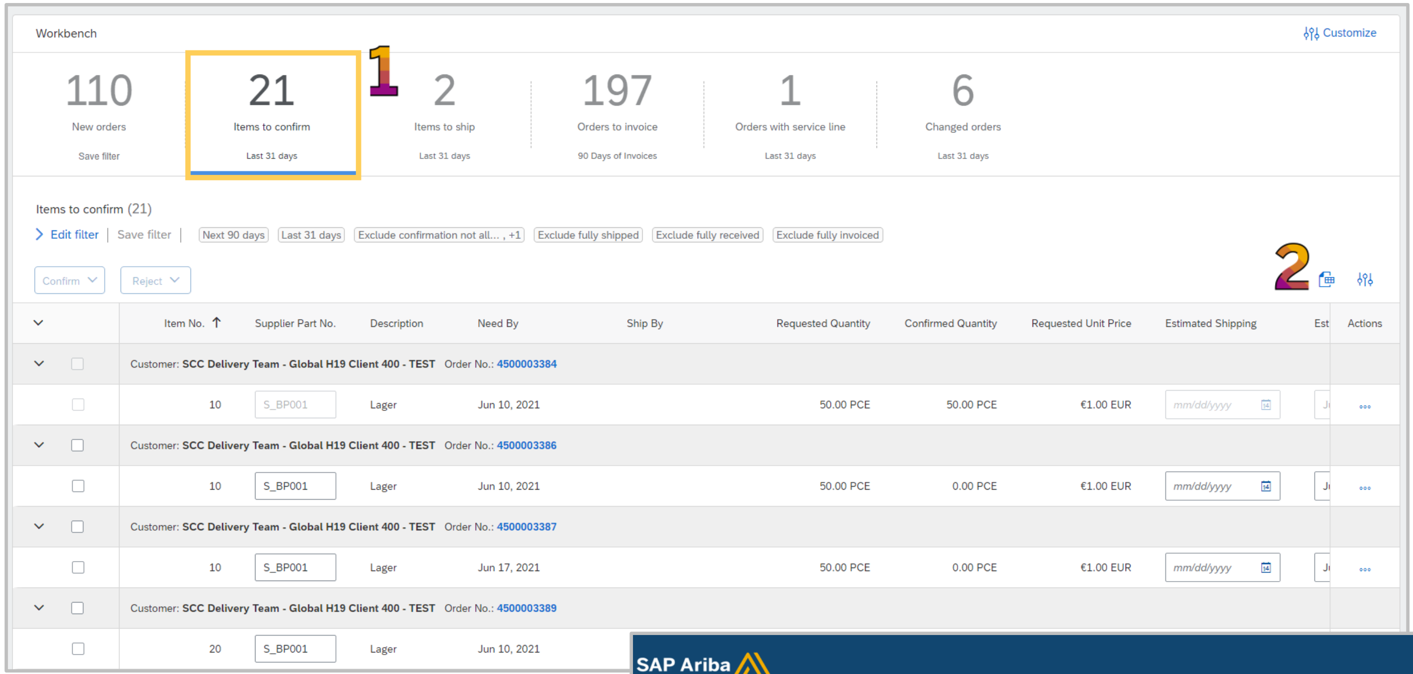
2. Click on ▦

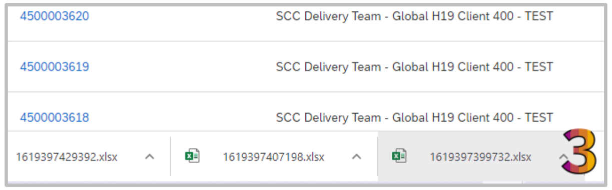
The Spreadsheet is shown as an icon at the bottom of the screen

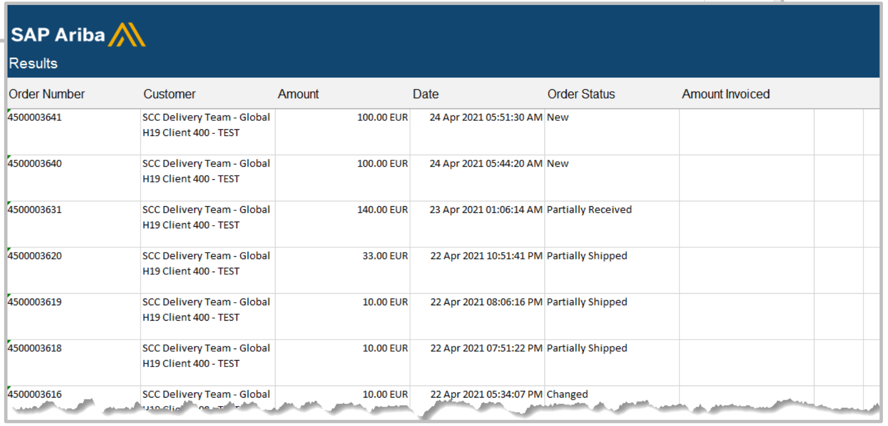
3. Click to open, the spreadsheet is displayed

Spreadsheets can be used to perform matching to your ordering system or ERP (for non-integrated suppliers)

Note: Only one tile at a time can be exported





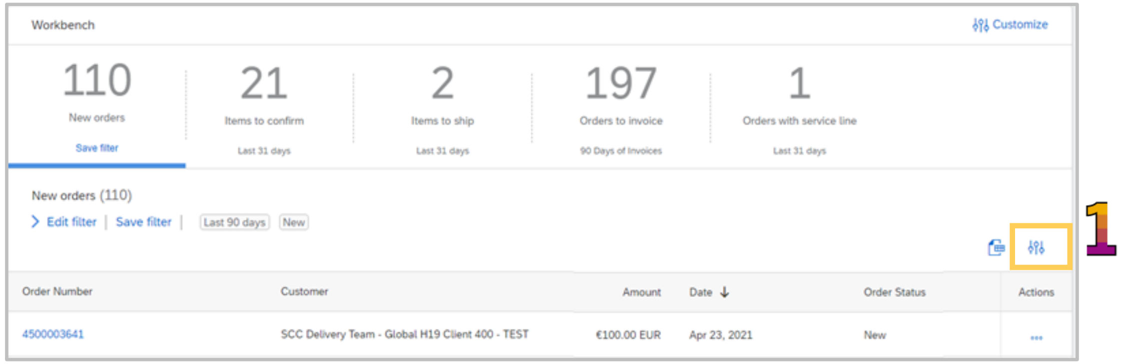


Workbench Table Settings

The Workbench table Settings allow suppliers to identify the table headings displayed

The headings provide information without opening the document

Some table headings can be sorted by clicking on the heading in the heading ribbon

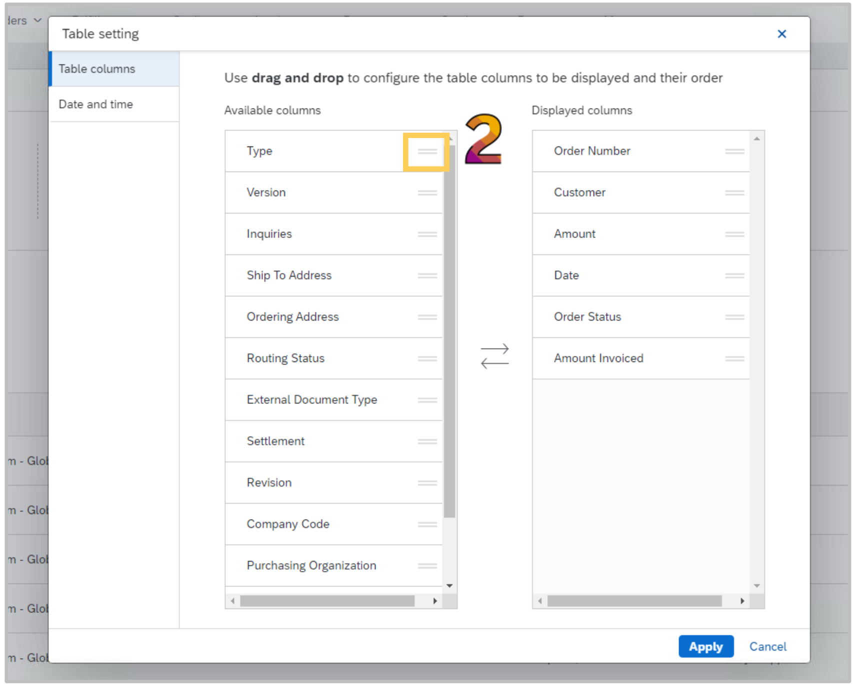


To change the **Table column** headings:

1. Click on

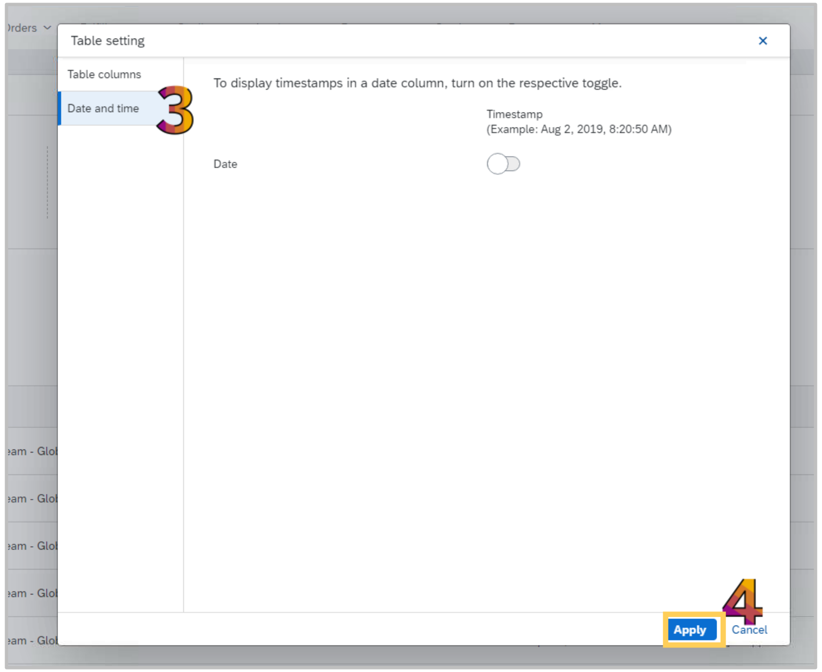
Screen opens the Table Settings menu

2. Hover over the until it turns into a hand, drag and drop from one column to the other



To change the table settings Date and Time information

3. Click on **Date and Time** in the side menu



Once all updates have been made

4. Click on **Apply**

Edit Filter

The Edit Filter allows users to filter tiles by parameters such as:

- Customer
- Date
- Status
- Customer Locations
- Order Type
- Routing

- Each Tile has its own set of filters, review the filters and select the ones that are required based on the Tile and the parameters associated with it.

The process remains the same irrespective of the tile used:

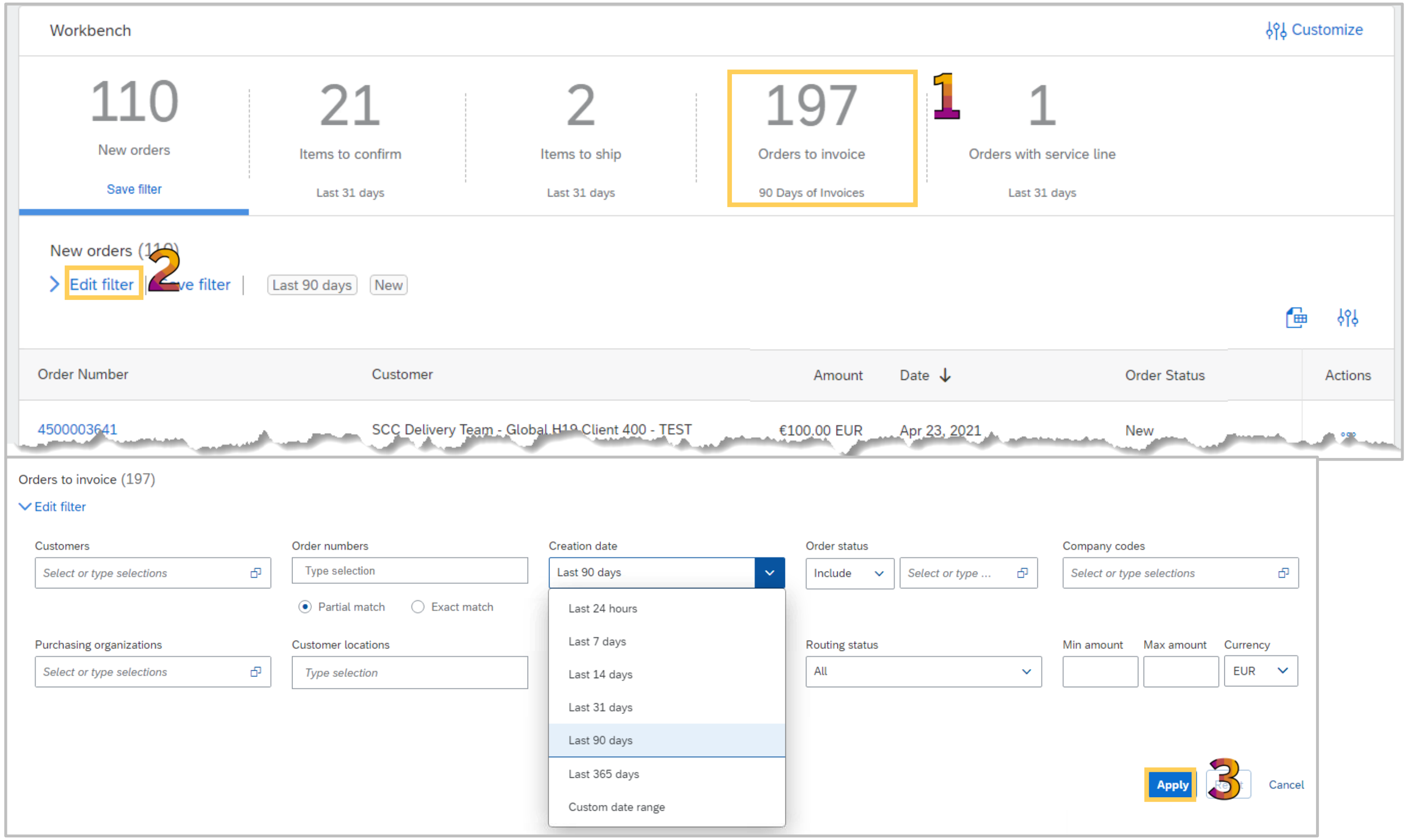
1. Click on the Tile you want to customize

2. Click on **Edit filter**

Note: The available parameters are displayed, some selections will have a Checkbox while others a drop down list

Choose the options from the available filters, once all parameters have been selected

3. Click on **Apply**, the filters appear next the Edit Filter selection



Save Filter

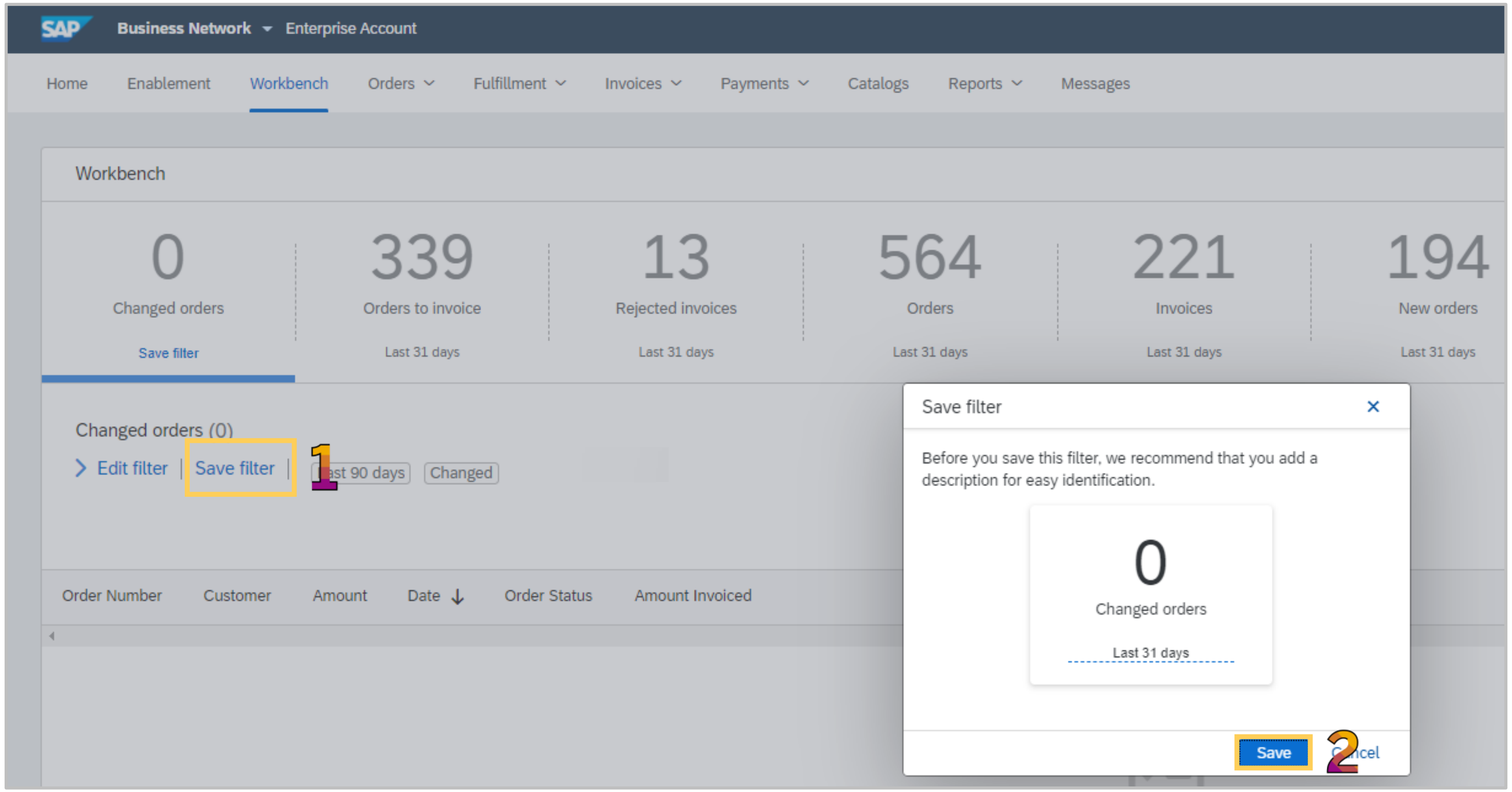
Save Filter allows users to save the parameters for a tile, edit filter only edits the view at the moment a user makes filter changes but is not saved until Save Filter is performed

Once all parameters have been set

1. Click on **Save Filter**

Confirm the description, this can be changed to reflect a specific customer or other description

2. Click on **Save**



Action Options

Take Action options allows users to perform actions without opening the document first

The actions available are based on those set out by your Buyer but can contain:

- Confirm entire order
- Update line items
- Reject entire order
- Create ship notice
- Create service sheet
- Standard invoice
- Hide

- **Note:** Options that are greyed out are not accessible, this may be because an order confirmation has not occurred first or it is not a process used by the Buyer

Refer to the Buyer Supplier Information Portal to confirm the processes required

1. Click on the ◦◦◦ under Actions to open the selection pane
2. Select the required option

- Use Hide to hide the document from the list, documents are not deleted but hidden and can be found using the filter option

Ariba Standard Documents

Information

There are standard documents that are used in the Ariba Network, for Supply Chain Collaboration specific documents refer to the Supplier Information Portal to identify the documents used for transacting with your Buyer

- The types of documents used by your Buyer is determined by the processes the Buyer has in place for transacting with their suppliers
- Some Suppliers will be part of an integration project where all information is entered into the supplier existing ordering system or ERP
- All Suppliers will receive a Purchase Order as this is your source document from your Buyer
- The Purchase Order can provide insight into the processes required by Buyers, where the Order Confirmation tab is available but the Ship Notice and Invoice options are not this indicates that an Order Confirmation is required by the Buyer and that you cannot complete other processes until an Order Confirmation is created
- An Invoice is created to achieve payment from your Buyer whether it is goods or services
- Each document is set up based on the Buyer requirements
- All Items with an Asterisks is a mandatory field and information has not been provided an error will be generated

The Purchase Order (PO) is the source document for the order and all subsequent documents are created from the PO

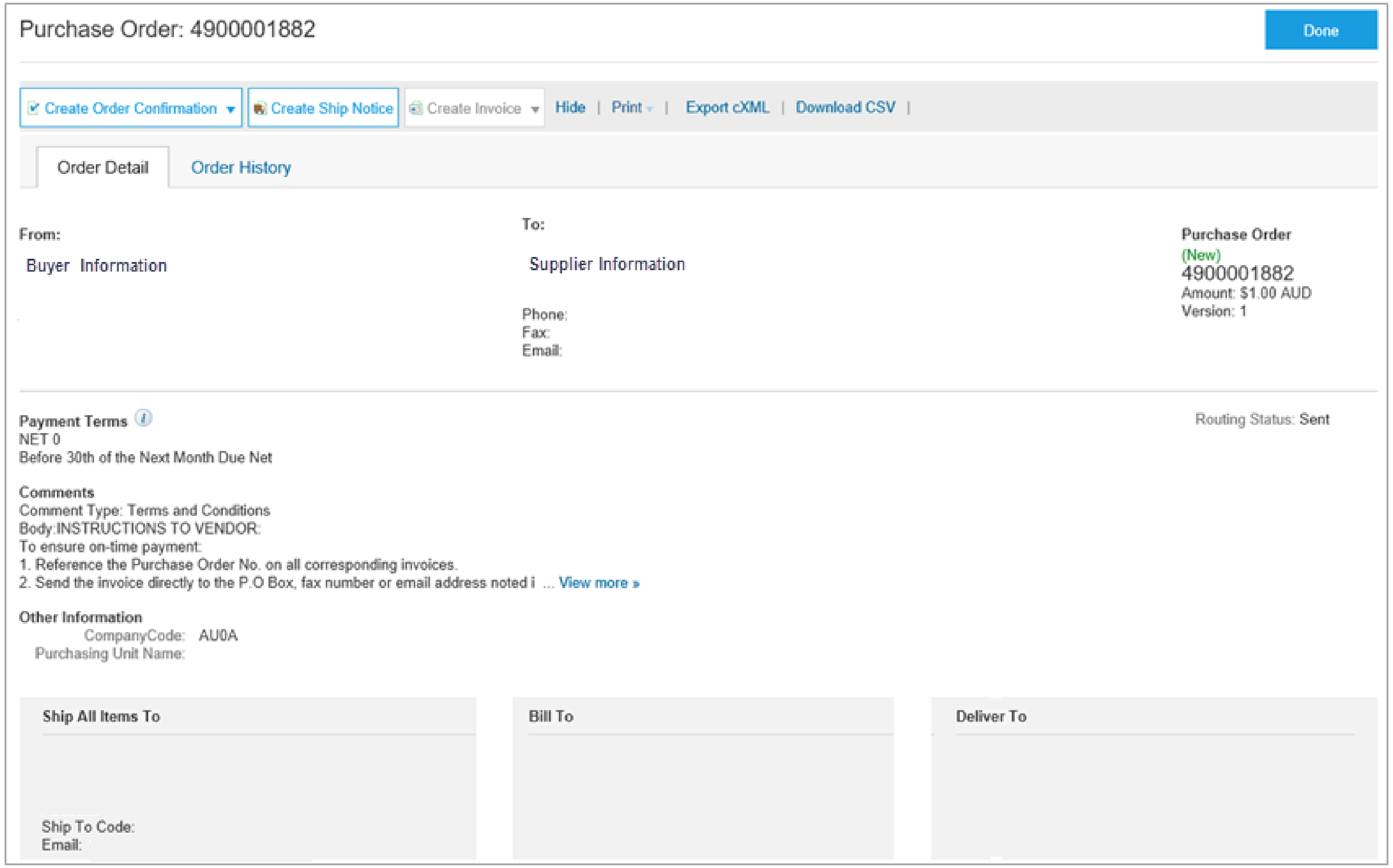
- A PO is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer. Receiving an Order from your buyer constitutes an offer to buy products or services

A **Purchase Order** may contains all or some of the following information:

- Purchase Order Number
- Order History
- Purchase Order Status
- Buyer Contact Information
- Terms, Comments and Other Information
- Ship To Details
- Bill To Details

- Any information that is greyed out indicates that is can not be selected, for example the Create Invoice cannot be actioned until goods are receipted

- Suppliers cannot adjust, deleted or change a Purchase Order only the Buyer can perform this task



The Ship Notice is the delivery information and is sent to the Buyer to advise them of the ship date for the materials

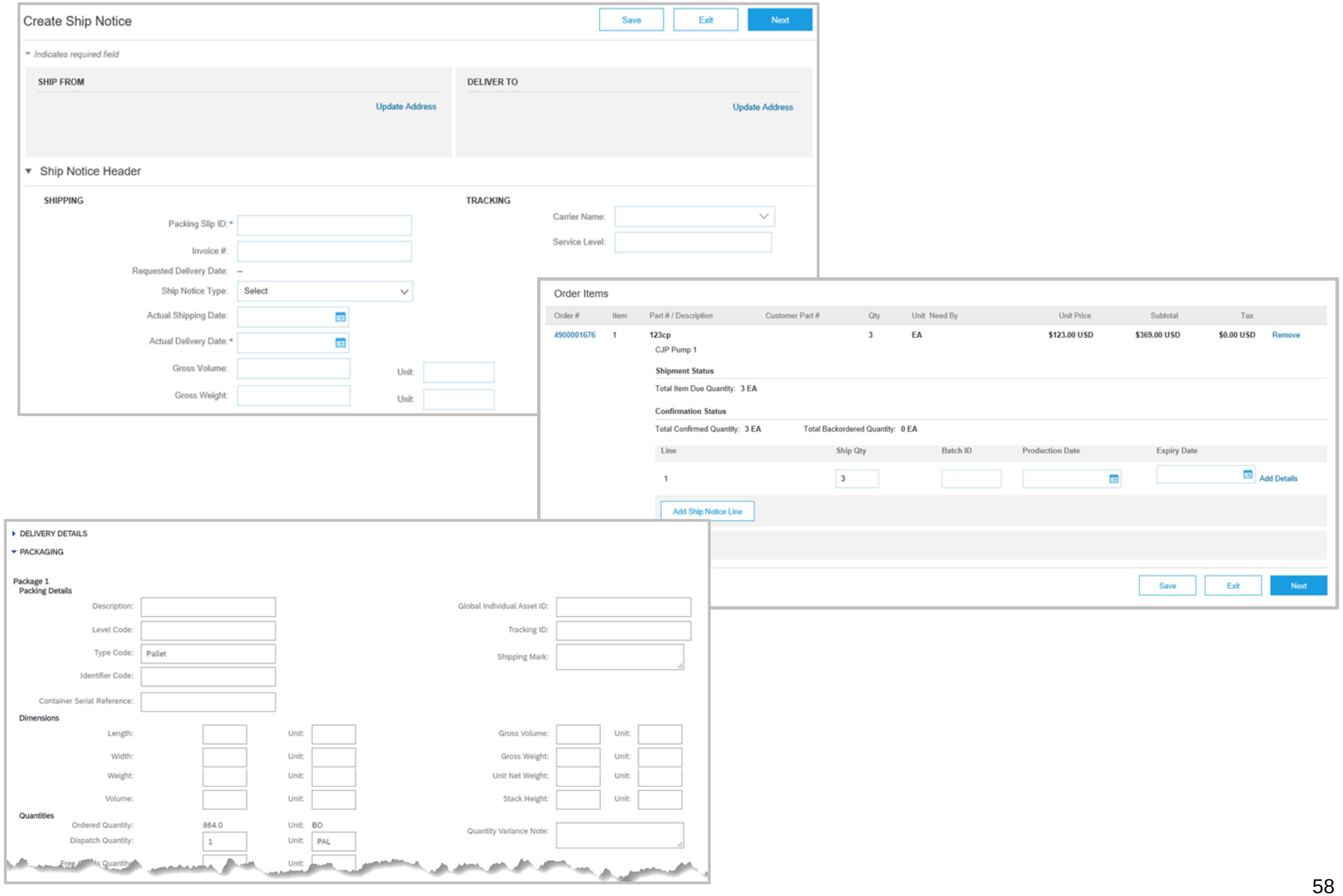
- The Ship Notice can be either a **required** or ***optional*** document for transacting with the Buyer

- A Ship Notice can be created for the full Shipment or for partial shipments, based on the requirements of the Buyer

Some Buyers ***may*** require further information to be added but not limited to:

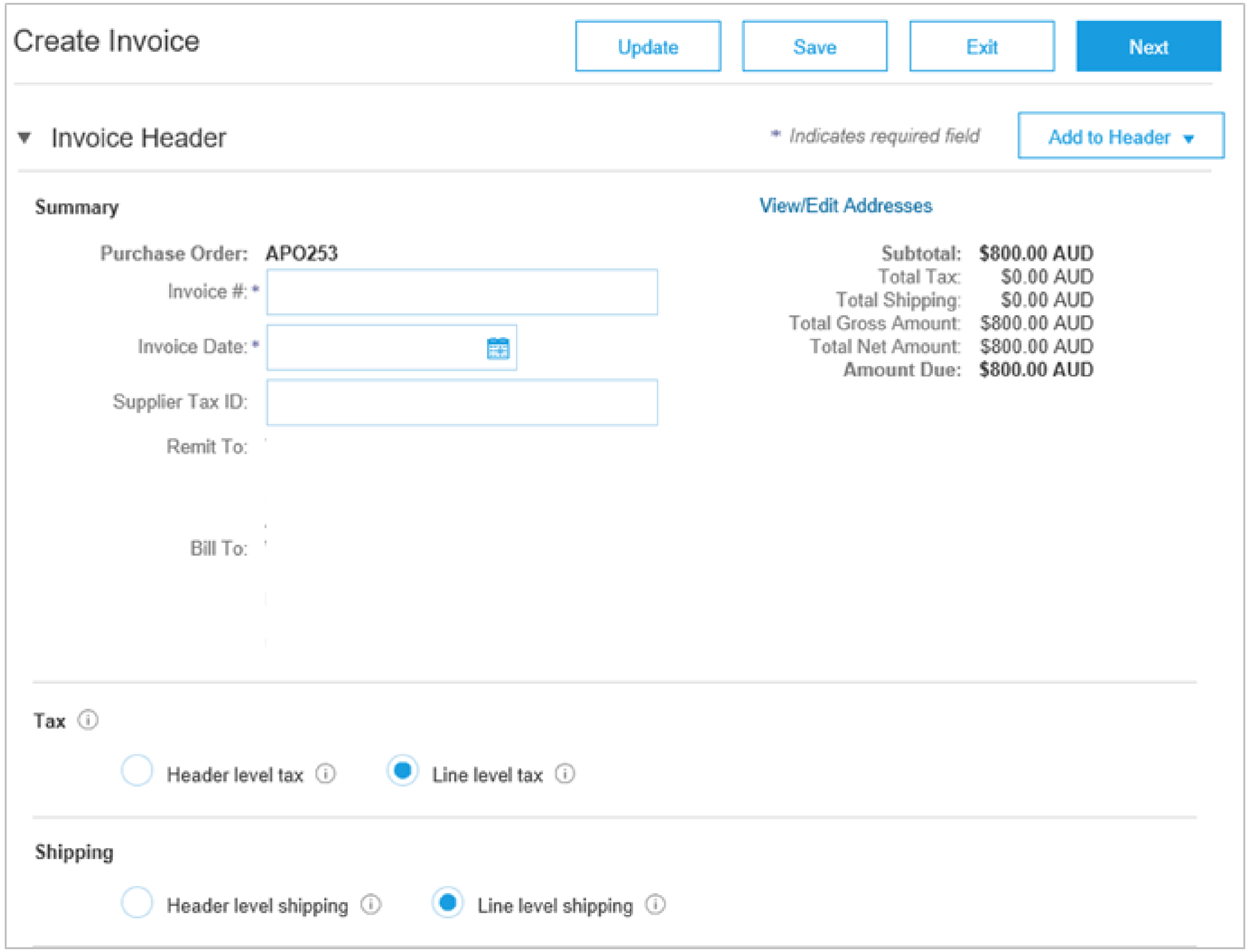
- Pack Sizing
- Expiry Dates for perishable items
- Batch Codes
- Production Dates
- SSCC Numbers
- Pallet configuration

- Refer to the Supplier Information Portals specific to the Buyer to identify whether a Ship Notice is required and what information should be provided



Invoice General Information

- All orders received via the Ariba Network require an Invoice to be created in the Ariba Network
- The Amount of the Purchase Order is exclusive of taxes
- Buyers may require suppliers to add taxes at either the Header or Line Item Level
- Add to Header allows suppliers to add attachments
- The Purchase Order reference number is automatically “flipped” into the Invoice
- Use Edit and Resubmit for invoices that have been rejected
- Once an invoice has been sent it cannot be recalled or cancelled, to correct and invoice Contact the Buyer



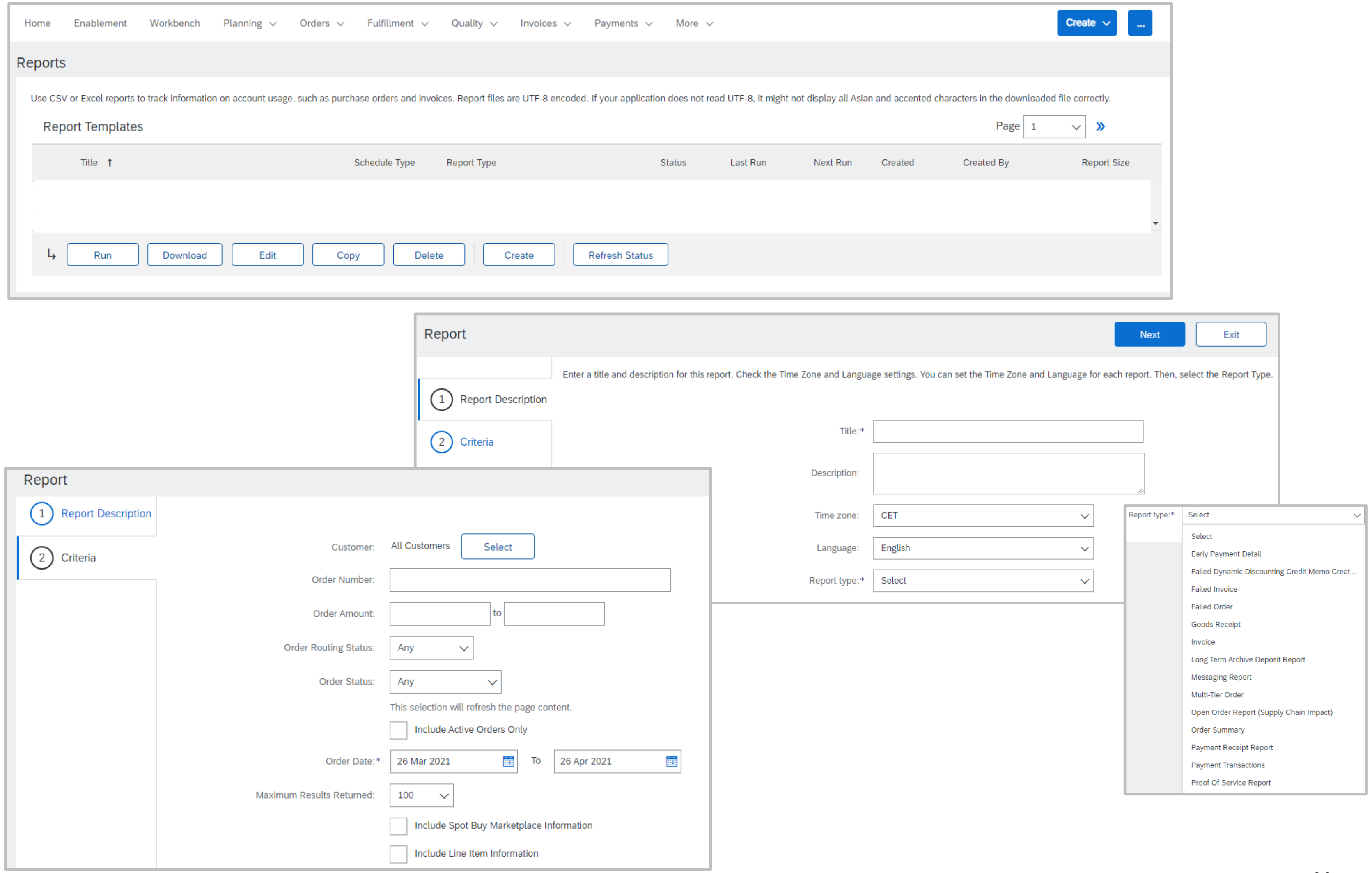
Suppliers are able to extract reports on specific documents to identify where in the process a document is, for example – invoices that are pending, approved or paid

- Report headings cannot be adjusted, however once a report is extracted the information contained within the report can be used

The available reports include but are not limited to:

- Invoice
- Goods Receipt
- Service Sheet
- Ship Notice
- Order
- Serial Number Report

- Each report may have a different time span for reporting information on, however if you require a report that has a maximum 14 day time span it can be for 14 days up to two years in the past



Glossary & Terminology

Seller Dashboard (Home) Fields & Tabs Information

- The first screen seen after logging in is the Seller Dashboard or Home page as the Home tab is highlighted.
- **Note:** that only the processes that your Buyer uses and the permissions set by your System Administrator determines what tabs are visible on the Seller Dashboard /Home page.
- SAP Business Network is displayed in the top Ribbon, selections to various parts of the Ariba Network commence from this screen, but can also be accessed from any other screen the tabs are displayed
- The following table provides users with information about he tab, field or selection option:

Name of Item	Tab, Field or Selection	Description/Use	Name of Item	Tab, Field or Selection	Description/Use
SAP Business Network Header	SAP Business Network	The SAP Business Network is displayed There is a drop down list that provides access to other items such as Sourcing and Quotes	Fulfillment Tab	Fulfillment	This is a Supply Chain Collaboration only process, and is for suppliers providing direct goods. Refer to the Fulfillment Guides
Home Tab	Home	The first screen viewed after logging in has the Home tab selected	Quality Tab	Quality	This is a Supply Chain Collaboration only process, and is for suppliers providing direct goods. Refer to the Quality Guides
Enablement Tab	Enablement	Steps required to start transacting in the Ariba Network, however please note, these tasks are performed by your system administrator	Invoices Tab	Invoices	Provides access to creating invoices, credit memos, line item credit memos and debit memos
Workbench Tab	Workbench	This is where you find all your documents by creating preferred views using filters to make transacting easier	Payments Tab	Payments	The payments tab provides suppliers with information about payments from buyers
Planning Tab	Planning	This is a Supply Chain Collaboration only process, and is for suppliers providing direct goods. Refer to the Planning Guides	Catalog Tab	Catalogs	The catalog tab provides suppliers with a view of the catalog they are using to transact with their buyer
Orders Tab	Orders	The orders tab displays all Purchase Orders sent from buyers in the Ariba Network, including change and inquires purchase orders	Reports Tab	Reports	Reports can be extracted for information in the Ariba network

Seller Dashboard (Home) Fields & Tabs Information cont.

Name of Item	Tab, Field or Selection	Description/Use	Name of Item	Tab, Field or Selection	Description/Use
Message Tab	Messages	The messages tab is used to send messages to the buyer	Getting Started Tab	Getting started 1	Getting Started may be displayed and is to indicate if there are any further tasks required to ensure that transacting through the Ariba Network is smooth
Create Drop Down	Create	The create drop down shows options for creating specific documents such as an Order Confirmation or Ship Notice	Orders and Releases Field	Orders and Releases	The document options that you can complete a search on, the default is Orders & Releases
More		The … (more) button allows users to create CSV/PDF documents and tracking information	Customer Selection Option	All customers	The list of customers that you are transacting with, users can choose specific customers or leave it in the default of All Customers
User Initials	JW	The initials of the User name	Exact Match Option	Exact match	Choose either Exact Match or Partial match to the document required
Help		Provides access to the help topic pane, what's new, guided tours, documentation and support	Order Number Search	*Order number*	Enter the number of the document you are searching for,
Back to Classic View	Back to classic view	This is a temporary option, once you have entered Classic view you cannot revert back to the Seller Dashboard without logging back in	Commence Search		A magnifying glass triggers a search or indicates that a search can be conducted
Feedback Option	Feedback	Feedback can be provided on the home page	Drop down Menu Available		Indicates that there is a drop down list of options
Overview	Overview	The overview button is on the seller dashboard/home page provides it is customizable	More options available	More	The ellipsis icon with More indicates that there is more information by clicking on it
My Widgets	My widgets	Widgets are the boxes that contain information, widgets can be set by the user to provide the information required by that user	Export		Allows users to export information into an Excel format

General Terms

Name of Item	Description/Use	Name of Item	Description/Use
ANID	The ANID is the Ariba Network Identification number, this number is unique for each Ariba Network whether a Buyer or Supplier Network	Credit Memo	A Credit Memo is a credit against a Purchase Order and at header level. For example use a Credit Memo when there has been an overcharge on shipping costs or the wrong Tax rate has been selected
ERS	Evaluated Recipient Settlement indicates that the Buyer will create the Invoice on behalf of the Supplier	Line Item Credit Memo	A Line Item Credit memo is a credit against an Invoice and is when a credit is required for damaged good or return of goods that where not fit for purpose
ERP	Enterprise Resource Planning is the integrated management of business processes such as Ordering and Invoicing	Rejected Invoice/ Edit & Resubmit	When an Invoice is rejected by the Buyer it will create a rejection, locate and open the Invoice and use Edit and Resubmit, correct the error based on the Buyer requirements and resubmit
Purchase Order	A Purchase Order is your document of truth, it is the source document from which all other documents will flow from, only the Buyer can change or update a Purchase Order	Ariba Discovery	Only used by Buyers and Suppliers that use Ariba Discovery to Request for Quote (RFQ) on goods or services
Invoice	An invoice is the document used to pay a supplier for goods or services provided based on the Purchase Order	Ariba Questionnaire and Proposals	Supplier Lifecycle Performance (SLP) is a process used by Buyers. Questionnaires are sent to a supplier from a Buyer and can be a Registration or Purchasing Questionnaire based on the Buyers requirements
Table Options Menu	Table Options menu allow suppliers to change the view of the screen to display different heading or information	Search Filters	Search filters provide users with the ability to narrow search options to locate specific types or documents in their Ariba Network
Ariba Sourcing	Ariba Sourcing is used as part of Direct Materials sourcing, it is a solution for managing sourcing and suppliers across all spend categories	Documents	A Document is the information sent and received via the Ariba Network
Active Buttons	Active Buttons are blue and can be selected to perform a task or process, greyed out buttons indicate that it is a process not used by a Buyer or requires another process to occur prior to activating	Fulfillment	The name of a tab that includes orders, order confirmations, ship notices, Services entry sheets, extended collaboration, product replenishment, drafts, extended collaboration and receipts
Order Confirmation	An Order Confirmation provides a Buyer with confirmation that good or services requested can be delivered or provided based on the information within the Purchase Orders	Opportunities	These represent collaboration requests
Ship Notice	A ship notice also known as an Advanced Ship Notice provides the Buyer with information about the goods arriving to their premises	Drafts	Documents can be saved as a draft for completion at a later point

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