

Ariba 9R1

Navigating the System



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Learning Objectives:

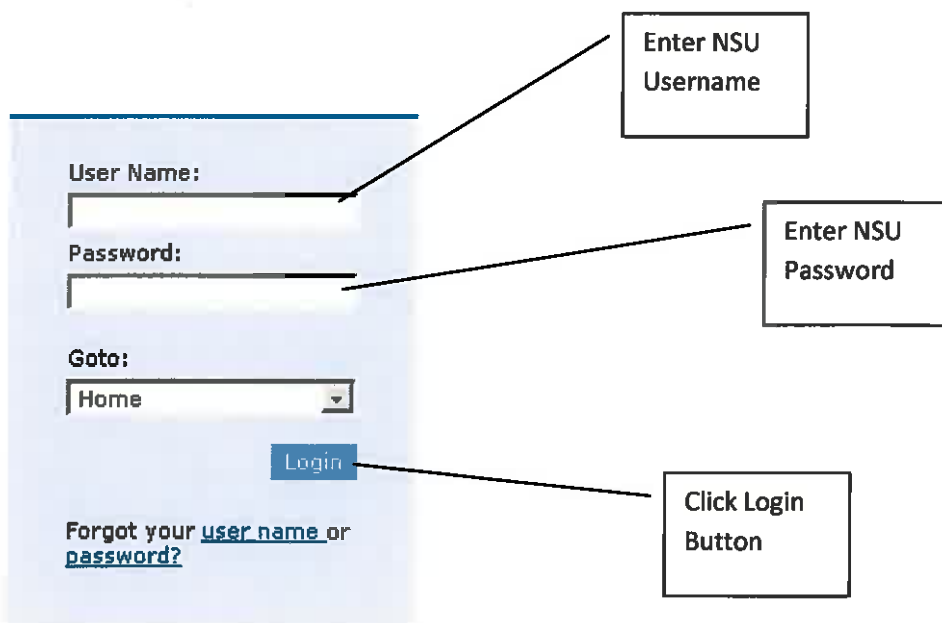
You will be able to:

- Logon to the Ariba System
- Understand and navigate the functional areas of the various Dashboard Pages including the masthead, the dashboard tabs, the command bar and the content items
- Understand the Error and Warning messages in Ariba 9R1
- Perform the procedure changing your profile in the setting your preferences area

Logon to the Ariba System

To Logon to the Ariba system you will need to open up an Internet Explorer 7.0 browser or higher or some other compatible browser.

Navigate to <https://ariba.nova.edu>



The image shows a login form for the Ariba system. The form is light blue and contains the following elements:

- User Name:** A text input field with a callout box pointing to it that says "Enter NSU Username".
- Password:** A password input field with a callout box pointing to it that says "Enter NSU Password".
- Goto:** A dropdown menu currently showing "Home".
- Login:** A blue button with the text "Login" in white. A callout box points to it that says "Click Login Button".
- Forgot your [user name](#) or [password](#)?** A link for users who have forgotten their credentials.

1. Enter your NSU Username
2. Enter your NSU Password
3. Click the Login button

You may see the invalid field error this means you need to update your shipping information in your profile. Just click OK and remember to update your profile later.

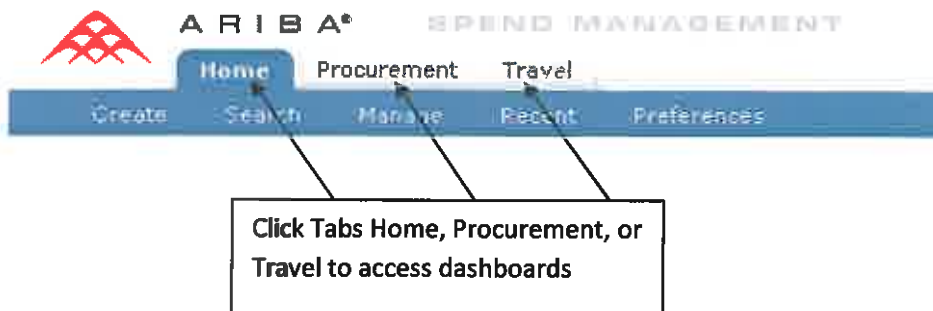
The screenshot shows the ARIBA eProcurement Management interface. At the top, there is a navigation bar with the ARIBA logo and the text 'ARIBA ePROCUREMENT MANAGEMENT'. Below this, there are tabs for 'Home', 'Procurement', and 'Travel'. Under the 'Procurement' tab, there are sub-tabs for 'Create', 'Search', and 'Manage'. The main content area displays an 'Invalid Fields' error message. The message states: 'These fields are invalid. Click OK to continue.' Below this, there is a table with two columns: 'Invalid Fields' and 'Reason'. The table contains one row with the following data:

Invalid Fields	Reason
Default Ship To	Default Ship To must be set.

Below the table, there is an 'OK' button. A line connects the 'OK' button to a larger box labeled 'Click OK', indicating the action to be taken to resolve the error.

Dashboards

This will take you to a dashboard. The 3 dashboards are Home, Procurement, and Travel and can be accessed by tabs



Each dashboard contains the following areas:

Masthead- Located at the top right of page, it contains the Home, Help, and logout commands, navigate to these functions by clicking them

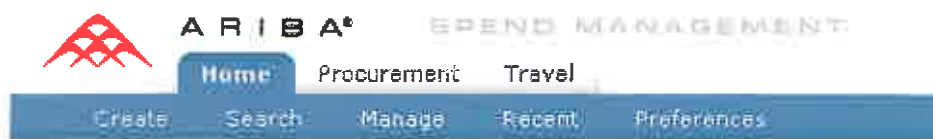
[Home](#) | [Help](#) ▾ | [Logout](#)

Home – Return to the functional area’s dashboard tab or you can click the dashboard tab itself

Help – View Documentation, training, and support information

Logout – End your session and exit Ariba

The Command Bar

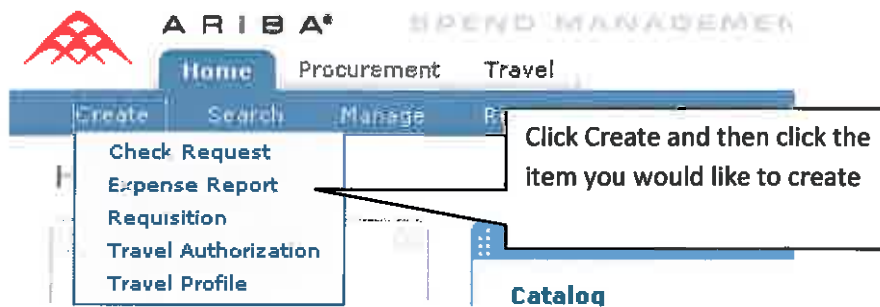


The command bar lets you navigate quickly between actions no matter where you are in the application

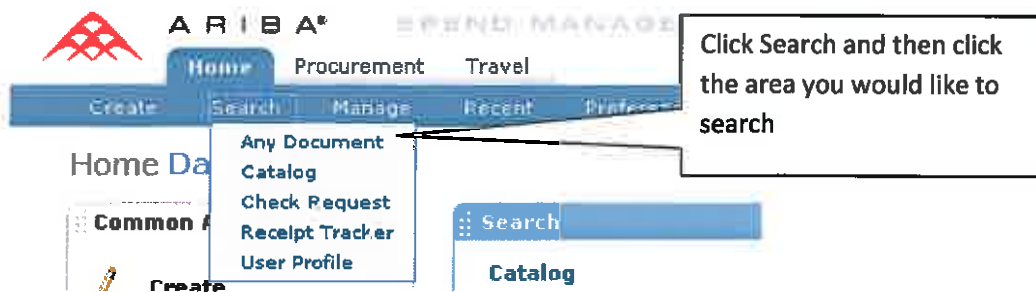
Note: If you are working on a document and switch to another action, the confirm exit screen is displayed to allow you to save or delete the request

The command bar contains the following menus, click the menu to display items, click the item to navigate to that area

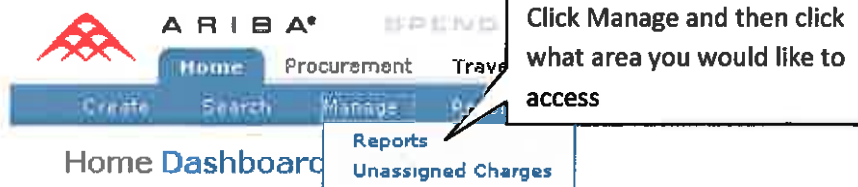
Create – Creates Documents



Search – Search for documents



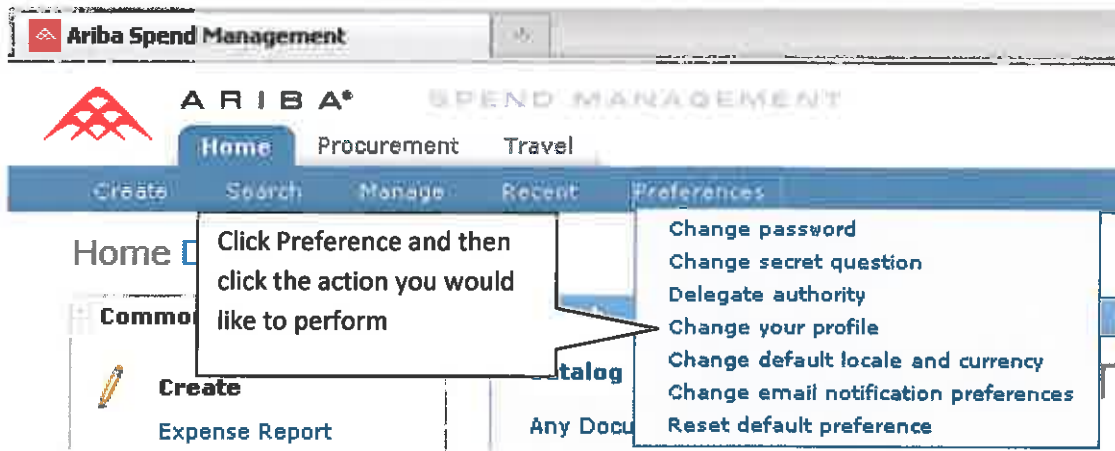
Manage – Manage documents or processes



Recent – Access the most recently viewed documents



Preferences- Delegate your authority, change user profile, and modify notifications and locale



Content Items

The dashboard pages include content items. The content items are as follows:

Home Dashboard Configure Tabs

Common Actions

Create

- Expense Report
- Travel Profile
- Travel Authorization
- Requisition
- More...

Manage

- Unassigned Charges
- Reports

Search

Keywords:

Catalog

- Any Document
- Check Request
- Receipt Tracker
- User Profile
- More...

Office Products (329)

- Office Depot Punchout Catalog, Copy at Office Depot Inc,
- CDWG Stage Punchout at CDW Government Inc,
- GovConnection catalog for direct punchout to at GovConnection,
- More ...

Maintenance, Repair and Operations (346)

- test punchout catalog for Grainger products at Grainger Inc,
- Miscellaneous Hand Tools (0)
- Electrical Systems and Lighting and Components and Accessories and Supplies (337)

Computers and IT equipment (132)

- Test catalog for validation at Camcor Inc,
- CDWG Stage Punchout at CDW Government Inc,
- GovConnection catalog for direct punchout to at GovConnection,
- More ...

Services (41)

- Marketing and Print Services (41)

Books, Forms and Printed Media

- Miscellaneous Printed Publications (1)

Miscellaneous (1498)

- Consumer Electronics (1488)

Machinery and Tools (3744)

- Unisource World Wide, Trash Bags, Paper and Material Handling and Conditioning and Storage and Their Accessories and Supplies (15)
- Laboratory and Measuring and Observing Equipment (3728)
- Janitorial Equipment (1)

Raw Materials (0)

- Medical Equipment and Accessories and Supply Manufacturing Components and Supplies (1)

To Do

ID	Date ↓	From	Status	Title	Required Action
No Items					

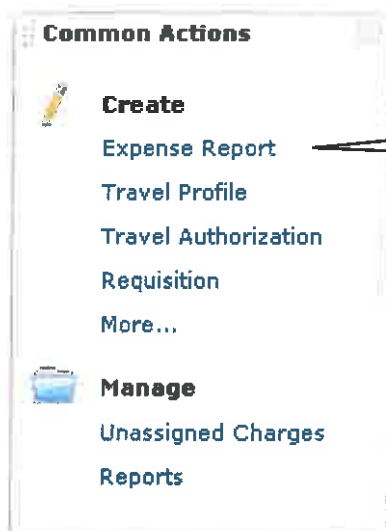
My Documents

ID	Title	Date ↓	Status
TR210	Untitled Expense Report	8/18/2010	Composing
TA151	Travel to Hawaii	8/18/2010	Approved
CR131	Untitled Check Request	8/18/2010	Approved

Common Actions: This content item displays links to common actions to create and manage documents and is another way to navigate to a particular function.

You would click the create or manage item to navigate to that area

Home [Dashboard](#)



In the content item Common Actions, click the action you would like to perform

To Do – this content item lists up to 20 documents that require your action from you

To Do					
ID	Date ↓	From	Status	Title	Required Action
<i>No Items</i>					

My Documents- this content item displays the most 20 recent documents you have created. Click on the document icon or title to open, review, edit, complete if required. The view list link in lower right provides access to all documents by type.

The screenshot shows a 'My Documents' window with a table of documents. A callout box points to the document icons and titles, and another callout box points to the 'View List ...' link.

Icon	Title	Date	Status
TR210	Untitled Expense Report	8/18/2010	Composing
TA151	Travel to Hawaii	8/18/2010	Approved
CR131	Untitled Check Request	8/18/2010	Approved

View List ... (3)

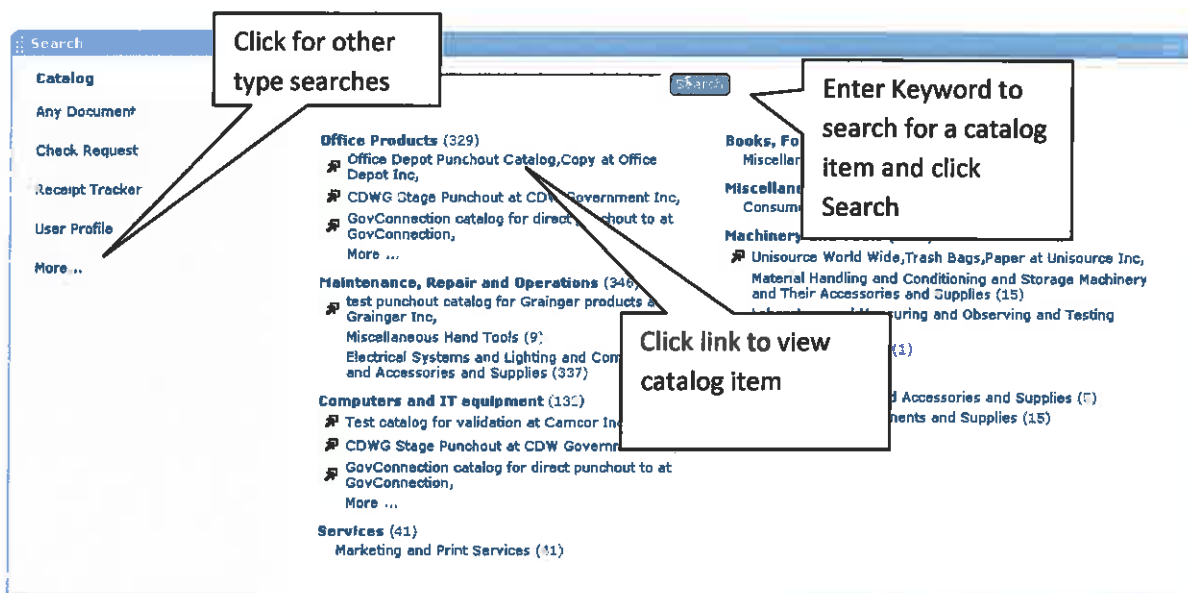
Recently Viewed – This content item displays the 5 most recent documents that were accessed either for review or to work on. Click document to access.

The screenshot shows a 'Recently Viewed' window with a list of document titles. A callout box points to the first document title.

Recently Viewed

- TR210 Untitled...xpense Report
- TA151 Travel to Hawaii
- CR131 Untitled Check Request

Search – this content item allows for you to quickly search catalogs, documents, or saved searches. The search panel on the left displays the most common document types that you may be interested in based on the functional area you are working in: click More to display and select other document types to search



Errors and Warnings

Warning or error messages appear when you do something like omit required information, enter an invalid value, or enter a value that violates policy. Warnings are usually informational and do not require any action on your part.

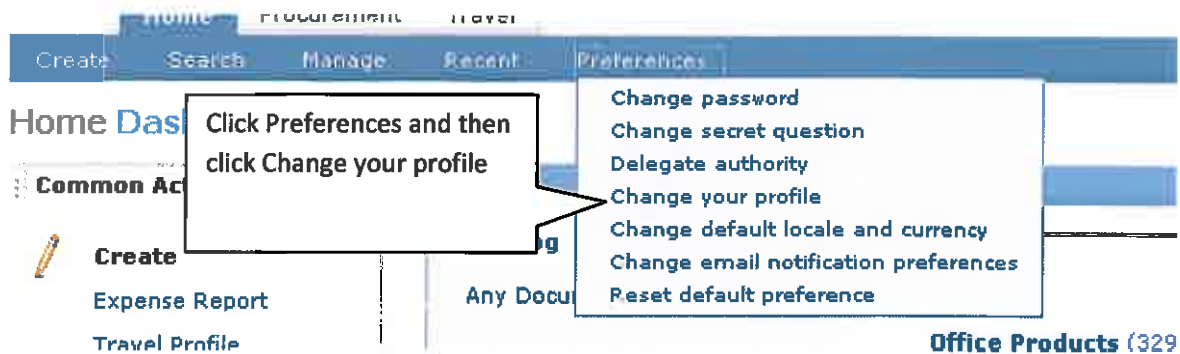
Errors typically require you to take an action. Read the message and follow the suggestions provided to correct the problem.

If there are multiple errors, you can use the Previous and Next links to move from message to message. Note that the error may not be on the page you are currently viewing.

Procedure To Setup Your Profile Information

To change your profile:

1. Click Preferences in the command bar
2. Click Change your profile.



3. Follow the Personal Profile wizard to review and change your personal profile information

The screenshot shows the 'Personal Profile' wizard for 'UP35: Trainee 1'. The wizard has five steps: 1. Personal Info, 2. Account/Ship, 3. Justify Changes, 4. Approval Flow, and 5. Review Changes. The 'Personal Info' step is selected. The form displays the following information: Name: Trainee 1; Business Email Address: *devnull@devmail.ariba; Supervisor: aribasystem; Groups: (select a value) [select]; Roles: (select a value) [select]; Permissions: NSUCheckRequest [select]. A note at the bottom states '(*) indicates a required field'. A callout box points to the 'Next' button with the text 'Review and click next to navigate wizard'. The 'Next' and 'Exit' buttons are located at the top right of the form.

- To change your shipping information, in the Ship To: Field click the drop down arrow and then click search for more

UP35: Trainee 1

The accounting and shipping information is used as the default account to which the items you order are charged, and the ...

- Change your accounting information:

Dept./Program: 66020-BUS SVS-POST

Activity Code: 66-Business Services

Account: []

Index/Org: []
- Change your shipping and delivery information:

Ship To: []

Deliver To: Search for more... []

(*) indicates a required field

Click drop down arrow and then click Search for more

- In the search area enter the name of your building
- Click the search button
- Select the building your office is located by clicking select
- Click done to leave without selecting

Choose Value for Ship To

Field: Name | admin Search

Name	Street	City	State	Country	
Admin Service Bldg	3600 South University Drive	Davie	FL	United States	Select
Main Administration	3301 College Avenue 1st Floor	FORT LAUDERDALE	FL	United States	Select
Main Administration	3301 College Avenue 2nd Floor	FORT LAUDERDALE	FL	United States	Select

Done

Enter name of building and click Search

Click Select by the building you are located

Personal Profile

UP37: Trainee 1

The accounting and shipping information is used as the default account

1. Change your accounting information:

Dept./Program: *

Activity Code: 66-Business Services

Account:

Index/Org:

2. Change your shipping and delivery information:

Ship To:

Deliver To:

(*) indicates a required field

Click the next button to navigate to the next page

Next

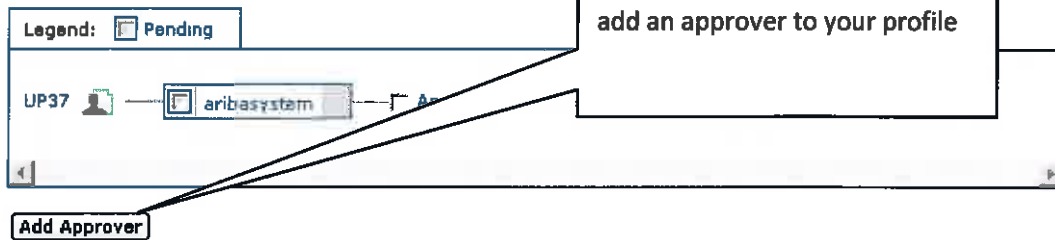
Prev Next End

9. Click the next button to navigate to next page
10. Enter a comment if required and click next
11. Check Approval flow if correct click next
12. To add approver click Add Approver

UP37: Trainee 1

Review the approvers assigned to review the request. Add and delete approvers as necessary, depending on your permissions.

APPROVAL FLOW - USER PROFILE



(*) indicates a required field

Review the approvers assigned to review the request. Add and delete approvers.

Click Search for more to find your approver

APPROVAL FLOW - USER PROFILE

Add approver to approval flow: *

Add this approver as:

Provide a reason:

13. Search for your approver

Choose Values for Add approver to approval flow

Alert: Found more than 500 items. Only the first 500 items are displayed.

Add to Currently Selected

Field:

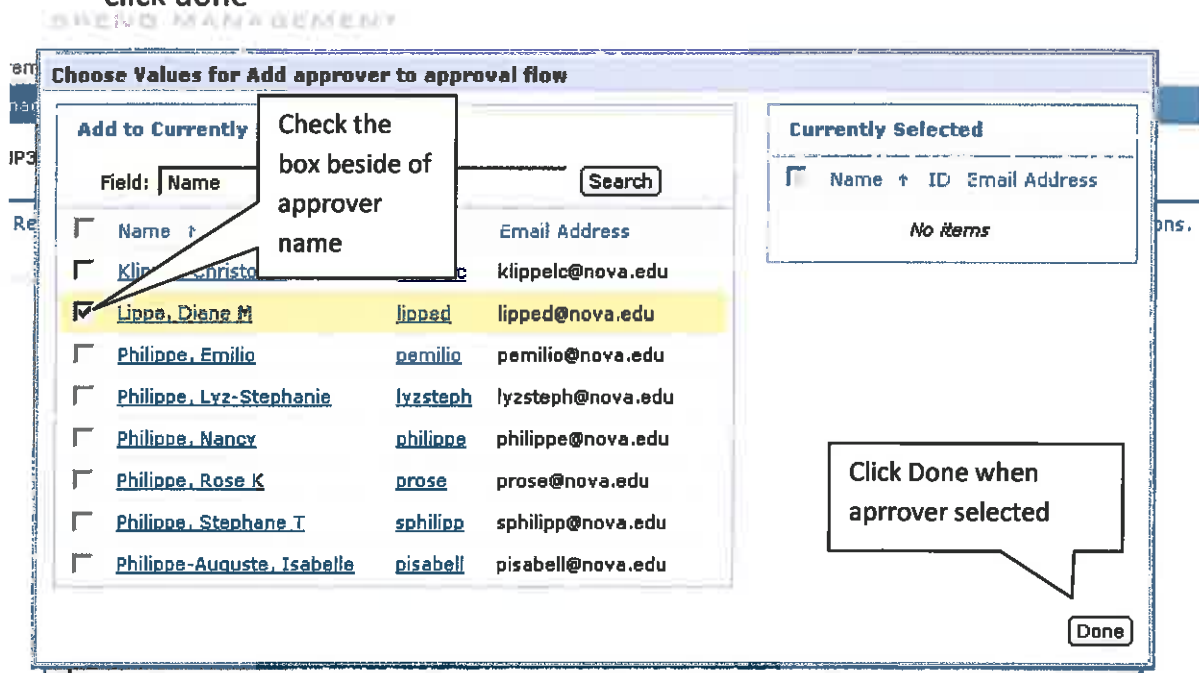
<input type="checkbox"/>	Name ↑	ID	Email Address
<input type="checkbox"/>	01 Watcher	01 Watcher	ariba@nova.edu
<input type="checkbox"/>	99 Watcher	99 Watcher	ariba@nova.edu
<input type="checkbox"/>	Abreu, Mirta	mirtabre	mirtabre@nova.edu
<input type="checkbox"/>	Access Participants Messages	Access Participants Messages	
<input type="checkbox"/>	ACM Administrator	ACM Administrator	
<input type="checkbox"/>	Acosta, Angelica	aacosta	aacosta@nova.edu
<input type="checkbox"/>	Active Team Member	TeamMemberActive	
<input type="checkbox"/>	ACW Authorized	ACW Authorized	
<input type="checkbox"/>	Aidie, Raquel	aidie	aidie@nova.edu
<input type="checkbox"/>	Alfonso, Lauren	al941	al941@nova.edu
<input type="checkbox"/>	Allen, Jacqueline	jacqalle	jacqalle@nova.edu
<input type="checkbox"/>	Almasri, Riad	almasri	almasri@nova.edu

Name ↑ ID Email Address

No items

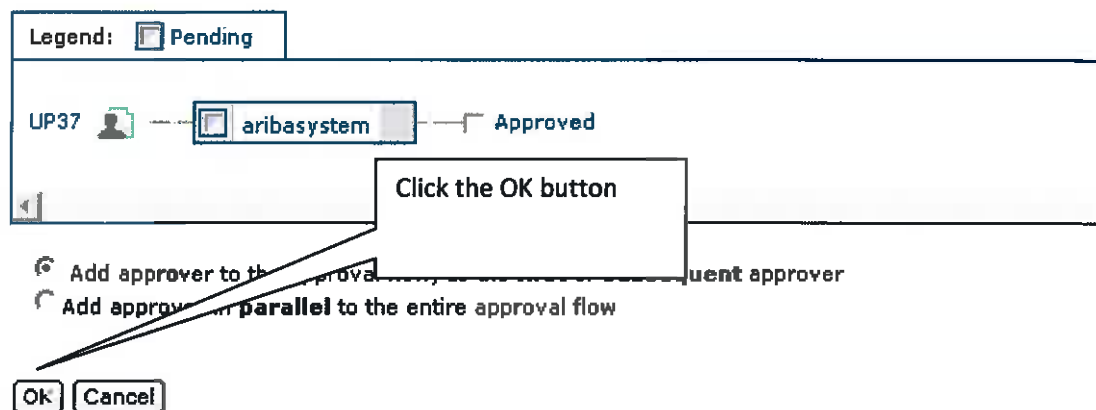
Type in name of last name of approver and click Search

14. When you find your Approver check the box beside the approver name and click done



Ⓞ Add approver to the approval flow as the first or subsequent approver

15. Click the OK button



16. Check the Approver is in the flow and click the next button

Legend: Pending

UP37 Lippe, Diane M aribasystem Approved

Add Approver **Delete Approver**

New approver was added successfully.

(*) indicates a required field

Check Approver and then click the Next button

Next

17. Check your changes and click submit

Personal Profile

1 Personal Info

2 Account/Ship

3 Justify Changes

4 Approval Flow

5 Review Changes

Review your request and then submit it for approval.

Change	From
Ship To	(no value)

(*) indicates a required field

Click Submit to Submit your changes for approval

Submit

Your profile will be submitted for approval; once it is approved you will no longer receive this message when you logon to the system.

Invalid Fields

These fields are invalid. Click **OK** to continue.

Invalid Fields

Default Ship To

OK

Reason
Default Ship To

You will not receive this message when your profile is approved