Training Workbook

Module 1: Navigating the System
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## Module 1: Navigating the System

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Learning Objectives:
Module 1: Navigating the System

Upon completion of this training the staff will be able to:

- Describe the purpose of the Ariba Buyer system
- Demonstrate the Login Process
- Describe the parts and functions of the Ariba Buyer Home Page
- Demonstrate the use of the Navigation Panel
- Demonstrate the use of the Command Bar
- Demonstrate the use of the Swoosh
- Describe the purpose of setting up a profile
- Demonstrate the setting up of a profile
What is the Ariba Buyer System?

- The Ariba Buyer system is a safe and secure web based site that is designed for the purpose of conducting transactions for Procurement and Travel & Expense.

- Nova Southeastern University will use the Ariba Buyer to conduct transactions and to interface with the SunGard SCT Banner for accounting of transactions

The Ariba Modules:

Nova Southeastern University (NSU) will use 4 components of the Ariba Buyer System depending on the transaction:

- Ariba Buyer- To have NSU employees conduct purchasing transactions from ordering thru receiving
- Ariba Invoice – To have vendors produce online invoicing to be paid
- Ariba Travel and Expense- To have NSU employees request travel and request reimbursement for travel
- Ariba Sourcing – To allow for the NSU purchasing department to conduct the sourcing process for procurement of material

The Basic Process Flow

Requisitions: Create => Approve ➔Sourcing if required=>Purchase=>Invoice=>Receive=>Reconciliations=>Sent to Banner

Travel Request: Create =>Approve=>Travel Arranged by Travel Office =>Traveler Travels

Travel Reimbursement: Create =>Approve=>Accounts Payable=>Traveler Reimbursed
Login to Ariba Buyer

Open up Internet Explorer browser 6.0 or higher or equivalent to URL:
http://ariba.nova.edu

1. Enter Username (NSU email)
2. Enter Password (NSU email password)
3. Click the Login Button
Parts of the Ariba Buyer Home Page

The Ariba Buyer Home Page consists of 3 parts

Navigation Panel
Command Bar
The Swoosh
Navigation Panel

The Navigation Panel contains links you can click to complete a task. The Navigation Panel groups related links in sections.

*NOTE: Never Use the Browser Back Button when Navigating ARIBA*

Click the section arrow to expand and contract links in a grouped section.

Click the link to start a task corresponding to the name of the link.
Command Bar

This area contains information about your current session as well as buttons to navigate to the home page, online help, and Logout. It also provides buttons that will:

*NOTE: Never Use the Browser Back Button when Navigating ARIBA. Use the Home button to navigate to the home page

- View and change preferences and personal profile information
- Hide or display the inline tips and their direct access to online help
- Display amounts in your default currency or a foreign currency
The Swoosh

The Swoosh allows you to click an action button to gain access to a certain action.
Setting Up the User Profile

When you login to the Ariba Buyer for your first time you will need to setup your user profile to let the system know some basic information to use.

Click Preferences on the Command Bar to access the preferences home page.
Preference Home Page

In the preference home page, you can change your password, delegate approval authority, change your profile and change your preferences.

To change your profile click the Change Your Profile link.
Change Your Profile Home Page

The Change Your Profile Home Page consists of a Navigation Panel with 5 sections to allow you to quickly navigate to the step you want to change or you could navigate through each step using the next, previous, and exit buttons.
Procedure to Change your Profile

1. Click Preferences in the Command Bar

2. Click the Change Your Profile Link

3. Check your name and email address
4. Click the dropdown menu next to supervisor and select supervisor name

5. If supervisor name does not appear, click other in the dropdown menu

   a. Enter Name of Supervisor in the search field
   b. Click Search
   c. Click Select by the name of your supervisor

6. Name will appear in the supervisor column
NOTE: You cannot designate yourself as a supervisor of yourself

7. Click Next button or Navigate Panel to Account Ship information
8. Enter Account information and Shipping information using dropdown menu

9. If you do not know the information, click other and search
10. Click Next button or Navigate Panel to Justify changes

11. Enter any comments you have about changes

12. Click Next button
13. Review your approval flow
14. You may add an additional approver by clicking the Add Approver Button
15. Click the next button or use Navigation Panel
16. Click Submit when changes are done

17. A confirmation page will appear when you are done

NOTE: Sometimes this page appears when you first login that will say that may have an invalid field. Just click OK and it will take you to the home page. This means you have to setup your profile
Summary

In this Module the following topics were discussed:

- The purpose of the Ariba Buyer system
- The Login Process
- Parts and functions of the Ariba Buyer Home Page
- Use of the Navigation Panel
- Use of the Command Bar
- Use of the Swoosh
- Setting up a profile