ARIBA: Hosted Catalog—General Navigation

This document will review tips for effectively using the hosted catalogs. Click the blue links to navigate to different sections of the document.

- Back to Top—Return here
- Access the Catalogs—Locate and enter the hosted catalog(s)
- Part Numbers and Descriptions

 —Review hosted catalog part number and description formatting
- <u>Search for Items</u>—Locate the item(s) to be ordered
- Search for Requisitions—Search for previously entered requisitions
- <u>Favorites</u>—Add, organize, and order favorite items
- Add Items to Cart
 —Add single or <u>multiple</u> items to the Ariba requisition cart
- Edit—Adjust your cart to update quantity or make other needed changes
- <u>Copy</u>—Copy requisitions for repeat orders
- Check Out—Complete and submit an order for approval

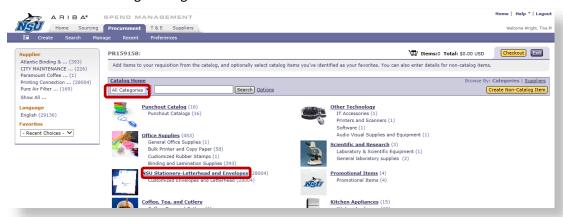


Access the Catalog(s)

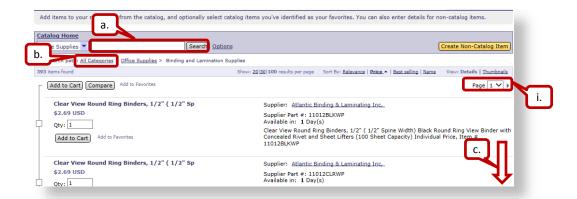
1. Log into Ariba at https://ariba.nova.edu and click 'Create' → 'Requisition' at the top of the page, or through Common Actions.



- 1. Catalog Home page
 - a. Click on a category to view all catalogs in that category.
 - i. Example—Clicking 'Binding and Lamination Supplies' navigates to Atlantic Binding and Laminating catalog.

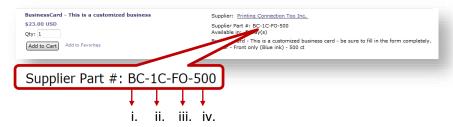


- 2. Catalog view—From this view you can
 - a. Enter information into the search box
 - b. Click 'All Categories' to return to Catalog Home
 - c. Scroll down the page to locate items manually
 - i. Select a page from the drop down menu, or go to the next page by clicking the arrow

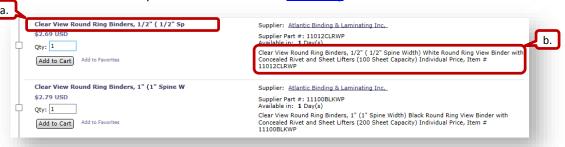


Part Numbers and Descriptions

- 1. Part numbers in each catalog are standardized when possible.
 - a. Example—Printing Connection Too part numbers
 - i. Product type: BC=business card, ENV=envelope, LET=Letterhead
 - ii. Color: 1C=one-color, 2C=two-color, ATH=Athletics, UNS=University School
 - iii. Printed surfaces: FO=front only/one-sided imprint, TS=front and back/two-sided imprint
 - iv. Quantity: 500=# of cards in the example; other quantities include 1,000, 1,500, 2,500, and 5,000



- 2. Description layout is also standardized.
 - a. An abbreviated, bold, purple description displays on the left side.
 - b. The full description-including brand name, description, and size-displays on the right-hand side.
 - i. The full description is available when searching.

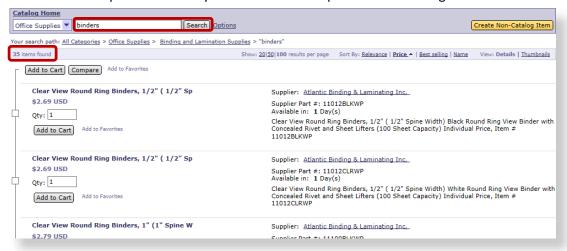


Back to Top

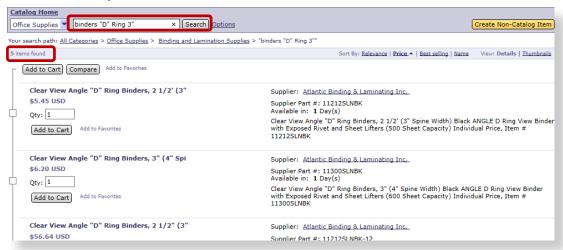
Search for Items

Use a combination of category, part number, and description for effective searches.

- 1. Select a category from Catalog Home before searching to limit search results to that category.
- 2. Once in the needed category, use the search box to locate products.
 - a. Refine search results by description and/or part numbers.
 - i. Example—Search only "binders" to list all products containing the term.



ii. Example—Add more terms to a search to limit results.



iii. Example—Search by part number to limit results to the item(s) with that exact part number.





Search for Requisitions

Previous requisitions can be searched for in Ariba at any time.

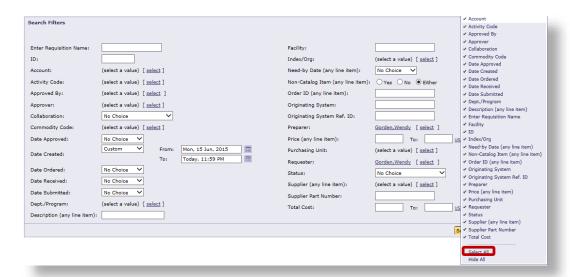
- 1. Click 'Search' then 'Requisition' to start a document search.
 - a. Most Ariba users have permission to view only documents that they create or are an approver for.



- 2. Set your search options the first time you search for a document.
 - a. Click 'Search Options' to view the available search filters.



b. Scroll to the bottom of the 'Search Options' drop down and click 'Select All.'

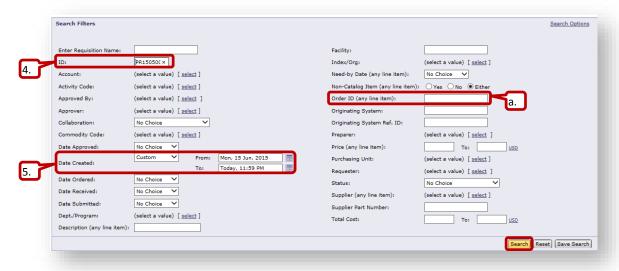


- 3. Click 'Select' next to 'Preparer' and click 'Clear' each time you search, to remove the defaulted information.
 - a. Repeat these steps under 'Requester.'
 - i. Clear defaults to insure inclusive search results. If 'Preparer' and 'Requester are not cleared, only documents repaired and requested by the listed user will display in search results.

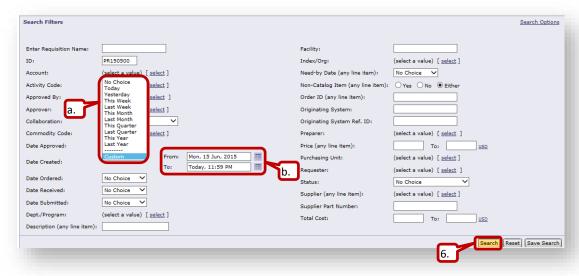




- 4. Type the PR number in to the 'ID:' field.
 - a. Enter the DO number into the 'Order ID' field if the PR is not available.
 - i. Enter the exact Ariba DO number, without the additional 0 added in Banner.
 - 1) Example: Search for DO12345 not DO012345
- 5. Note the 'Date Created' field is now defaulted to the previous two weeks.



- a. Click the 'Date Created:' drop down to select a predetermined date range
- b. OR click on the calendar icons to select a specific date range.



- 6. Click 'Search.'
- 7. Click the document number or name to open the located document(s.)



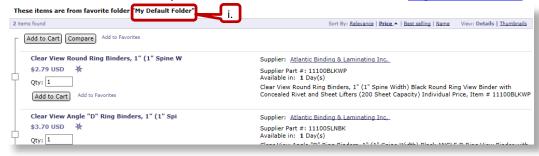
Favorites

Add hosted catalog items to 'Favorites' to create a shopping list and speed order entry.

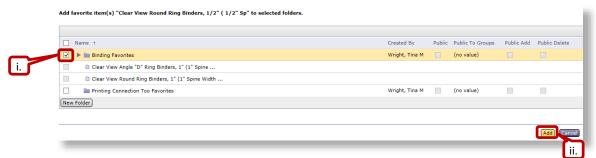
- 1. Favorite items will be automatically marked with a purple asterisk for visibility.
- 2. Click 'Add to Favorites' to view the three options.



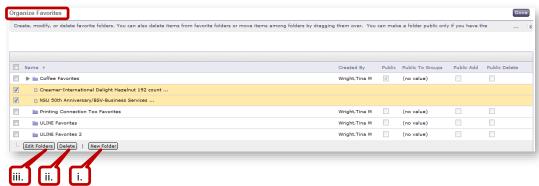
- a. Click 'Add' to include favorites in 'My Default Folder.'
 - i. 'My Default Folder' contains any favorites not added to a specific folder.
 - ii. Items added to 'My Default Folder' are also visible on the 'Organize Favorites' screen.



- b. Click 'Add to Folders' to select which folder the new favorite will be added to.
 - i. Select the folder you would like the favorite to be added to.
 - ii. Click 'Add.'

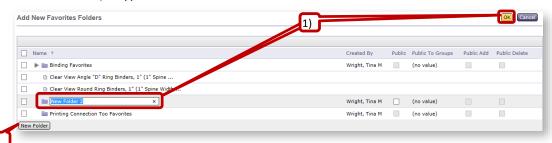


- iii. A new folder can also be created from the 'Add Favorites to Folders' area.
- c. Click 'Organize Favorites' to i. create, ii. delete, or iii. edit favorites folders.





- i. Click 'New Folder' to create a new folder.
 - 1) Type over the default name to name the New Folder and click 'OK.'



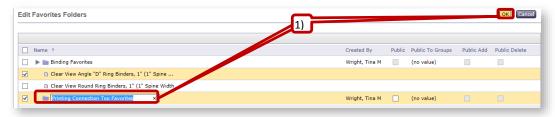
ii. Check the box next to the line and click 'Delete' to delete a favorites folder or line item.



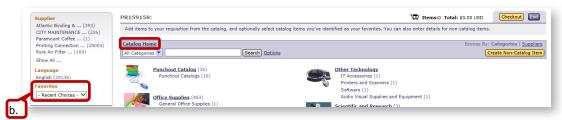
iii. Check the box next to the folder and click 'Edit Folders' to rename a folder.



1) Type over the existing folder name and click 'OK' to complete this action.

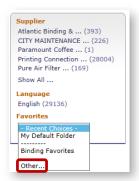


- 3. Access 'Favorites' for order creation from 'Catalog Home.'
 - a. Create a requisition or click 'Add from Catalog' to access 'Catalog Home.'
 - b. Click the drop down arrow under 'Favorites' to view options.

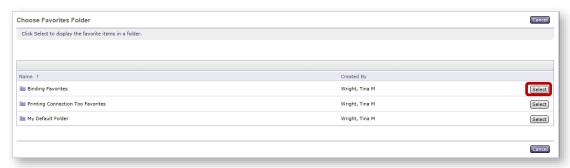




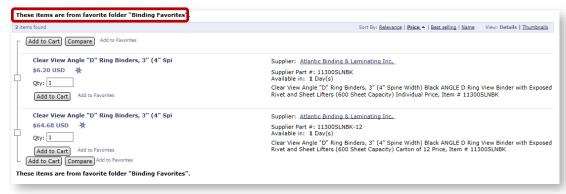
c. Click 'Other' to view all favorites folders.



d. Click 'Select' next to the needed folder to view favorites for that folder.



- i. All favorites in the selected folder will be displayed.
 - 1) Add <u>single items</u> or add <u>multiple lines</u> to cart.

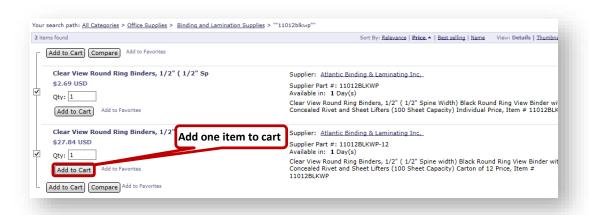


Back to Top

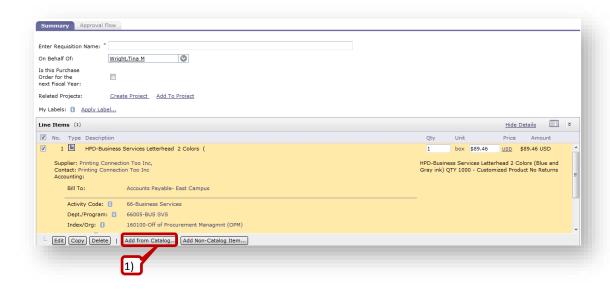
Add Items to Cart

Once the needed items are located, click the check box next to the item(s) and click 'Add to Cart.'

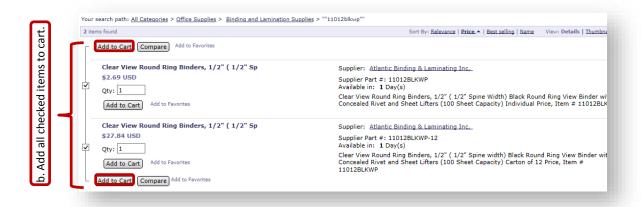
- 1. Different 'Add to Cart' buttons are used to add single items or multiple items to a cart.
 - a. Click 'Add to Cart' directly under an item's quantity to add a single item to the cart.



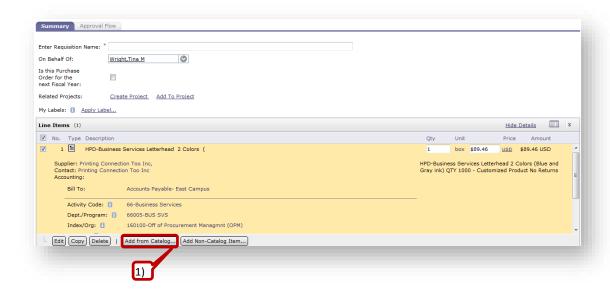
- i. This action will return you to your Ariba requisition.
 - 1) Click 'Add from Catalog' to add additional items to your requisition.
 - a) This will take you to the **Catalog Home** page.
 - 2) Go to Check Out to complete the order.



- b. Select the items and click 'Add to Cart' at the top or bottom of the page to add multiple items to a cart.
 - i. Business cards must be added to the cart one at a time or an error will display.



- ii. This action will return you to your Ariba requisition.
 - 1) Click 'Add from Catalog' to add additional items to your requisition.
 - a) This will take you to the <u>Catalog Home</u> page.
 - 2) Go to Check Out to complete the order.



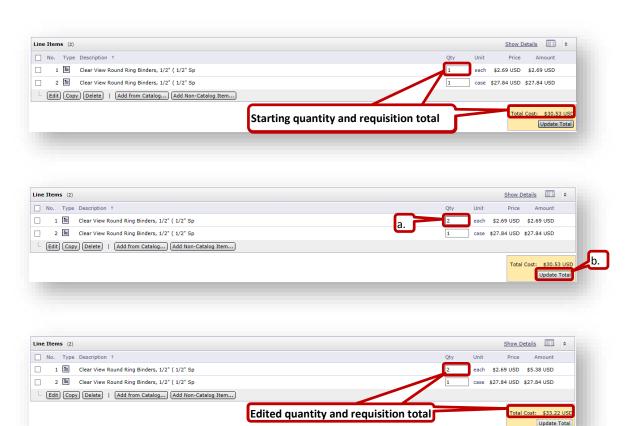
Back to Top



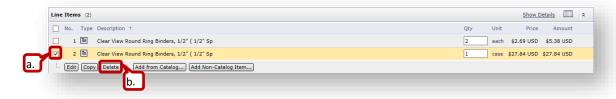
Requisition Edit Tools

Once returned to the Ariba cart, hosted catalog lines still allow for adjustments.

- 1. Quantities can be edited from the Ariba cart.
 - a. Click in the quantity area and type the desired quantity.
 - b. Click 'Update Total' to recalculate the requisition total.



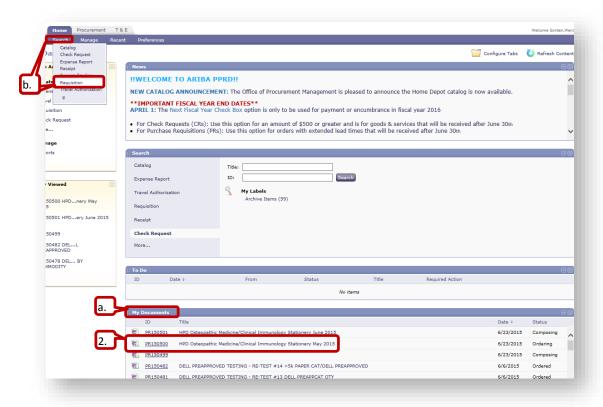
- 2. Unwanted items can be removed from the Ariba cart.
 - a. Click the check box to the left of the item.
 - b. Click 'Delete' under line items.



Copy

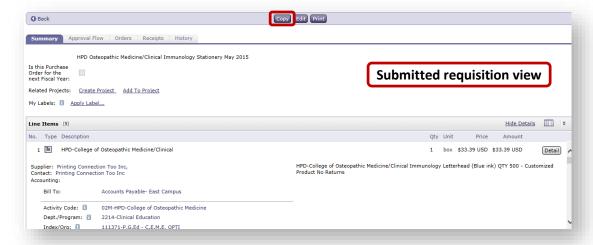
Previous hosted catalog requisitions can be copied to speed order entry.

- 8. Locate the previous requisition through one of two options.
 - a. Scroll down to 'My Documents.'
 - b. OR click 'Search' then 'Requisition.'
- 9. Click on the PR number or title to open the document.

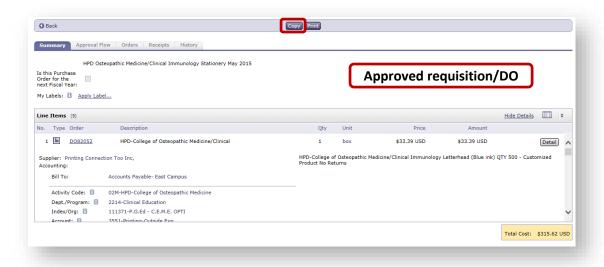


10. Click 'Copy.'

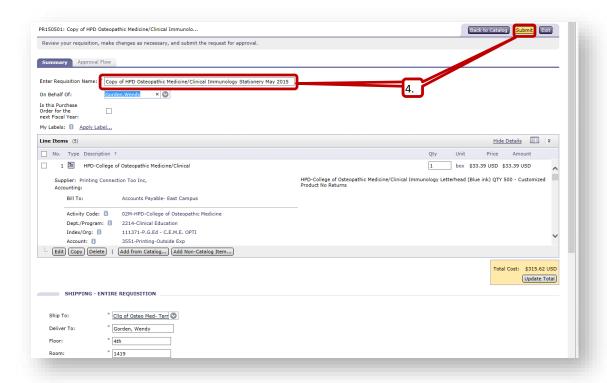
a. The view and options will differ for submitted requisitions and approved and ordered requisitions.







- b. The new requisition will retain the items listed below.
 - i. line items with quantity
 - ii. accounting details
 - iii. ship to and delivery details
 - iv. requisition title with 'Copy of' added to the front
- c. The new requisition will clear all comments and attachments.
- 11. Update the title as needed and click 'Submit.'
 - a. OR Continue to 'Requisition Editing Tools' to delete line items or adjust quantities.

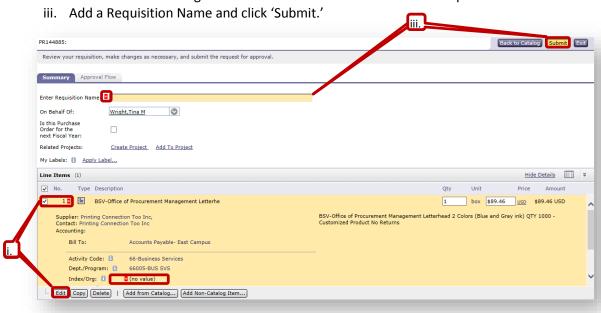




Check Out

Proceed to check out when your cart is complete.

- 1. Resolve any errors by editing the line item with errors and completing missing information.
 - a. In the example below, clearing the error requires the listed steps.
 - i. Check the box to the left of line one to select the line, and then click 'Edit.'
 - ii. Search for the missing index information or select it from the drop down menu.



2. If there are no errors, click 'Submit.'

Back to Top

Please contact <u>aribahelp@nova.edu</u> if you have any questions or need assistance with hosted catalogs or any of their features.